

Confluence Wealth Management Connects Community and Clients at Christmas Party

by Sydney Sinks, News Reporter
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ALTON - [Confluence Wealth Management](#) welcomed 200 clients and friends to their second annual Christmas party to mingle, celebrate and express appreciation.

On Thursday, Dec. 7, 2023, clients gathered at Old Bakery Beer Company in Alton and enjoyed a meal with each other and Confluence Wealth Management owners Robert Diaz and Jack Hoelscher. Attendees could also donate to the [Salvation Army](#) Red Kettle Campaign. Hoelscher explained that the party was a fun way to give back to the company's clients and the community.

"It's really just our way to thank our clients for their business and just get everybody together at a fun time of the year," he said. "Our intention and our hope is that, whether it's through this event or other efforts, that this is going to grow in scale as our business grows. We'll be able to increase the impact of those relationships and of our charitable giving in relation to that. We really hope to do more and more each year to improve the community around us."

Hoelscher and Diaz hosted their first Christmas party last year, and they were delighted by their clients' engagement. Community members were able to meet and network, but there were a few important reunions, too. Hoelscher and Diaz tell the story of two clients who hadn't seen each other since high school, reintroduced at the party.

This "fellowship," Diaz explained, is an important part of the business they do at Confluence Wealth Management. As financial planners, they share an intimate relationship with their clients and often help them make decisions that will impact the community. Diaz and Hoelscher prioritize charitable giving, and they know their clients do, too.

"Really, I think it brings people together and really solidifies not just our relationship with them, but their relationship with each other," Diaz added. "It's just an alignment of values that we share with clients. The best part of our day is really helping clients to use what they've saved and accumulated and support the things, the missions, the charitable organizations and everything with their own finances."

This is why Confluence Wealth Management decided to donate to the Salvation Army and encouraged their clients to do the same. Mike and Karen Roberts, local chairs for the Salvation Army Red Kettle Campaign, were present to talk about the organization's role in the Riverbend community.

"That same Salvation Army that for most communities is so invisible so much of the year is visible now with these ringers," Mike Roberts said. "And this little red bucket makes such a difference."

As party guests ate, drank, mingled and donated, Diaz and Hoelscher noted their appreciation for the community and the people who trust them as advisors. They included their own donation and then asked attendees to raise a glass.

“I’d like to share a toast with the 200 closest people in my life,” Diaz laughed. “We’d like to express our deepest gratitude to each and every one of you. Your trust, your loyalty and your continued support of our business, of us, means the world to us. It’s the reason that we come to work every day. It’s the reason that we strive to do better and really the reason that we love what we do.”

For more information about Confluence Wealth Management, visit their [official website at RaymondJames.com/ConfluenceWealth](https://www.raymondjames.com/confluencewealth).

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