

Fund Dashboard: Trusts & Gift Annuities

Thank you for allowing us to serve as your giving partner. You can access and update your account information at your convenience through the Fund Dashboard. Below are useful tips as you log on.

As a donor with a trust or gift annuity, you have two sections to explore. Please see Page 2 for helpful navigation tips.



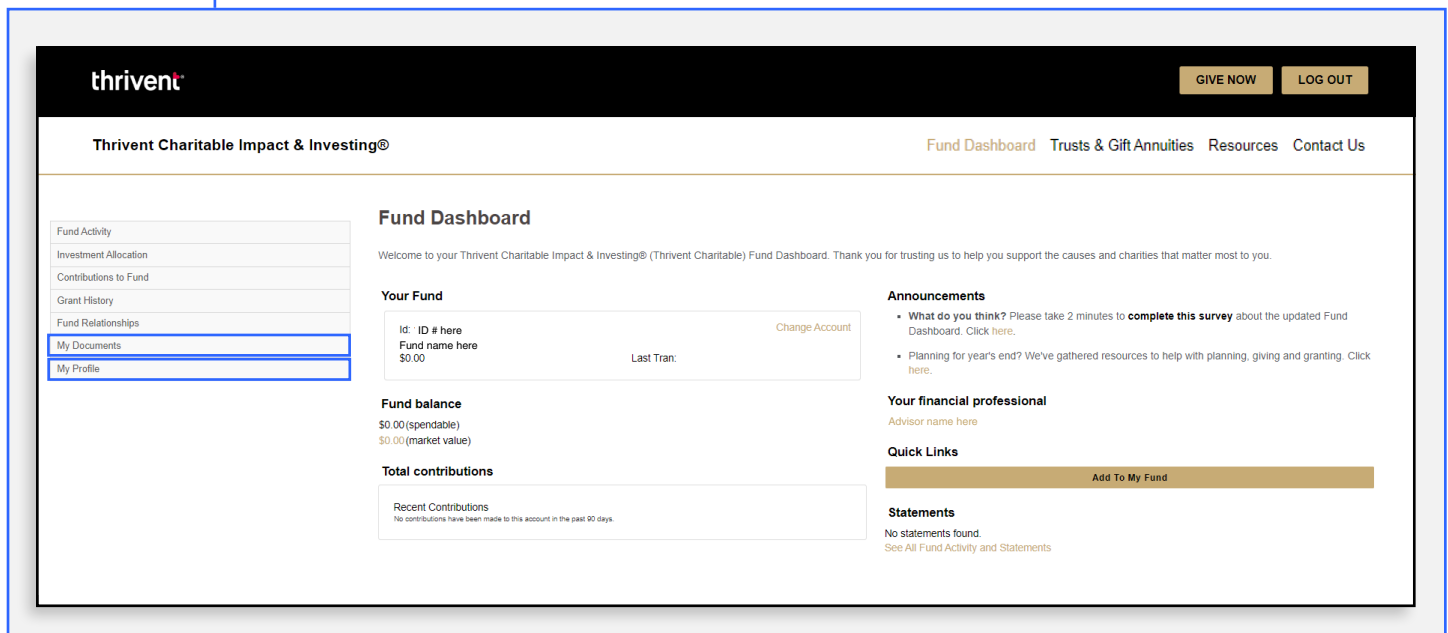
Need to update your profile? Want to review your charitable fund beneficiaries? It's simple.



Forgot your user ID? Retrieve your user ID and/or reset it to your preference.



Do you like to view your fund on your phone? The layout automatically adjusts for mobile screens.

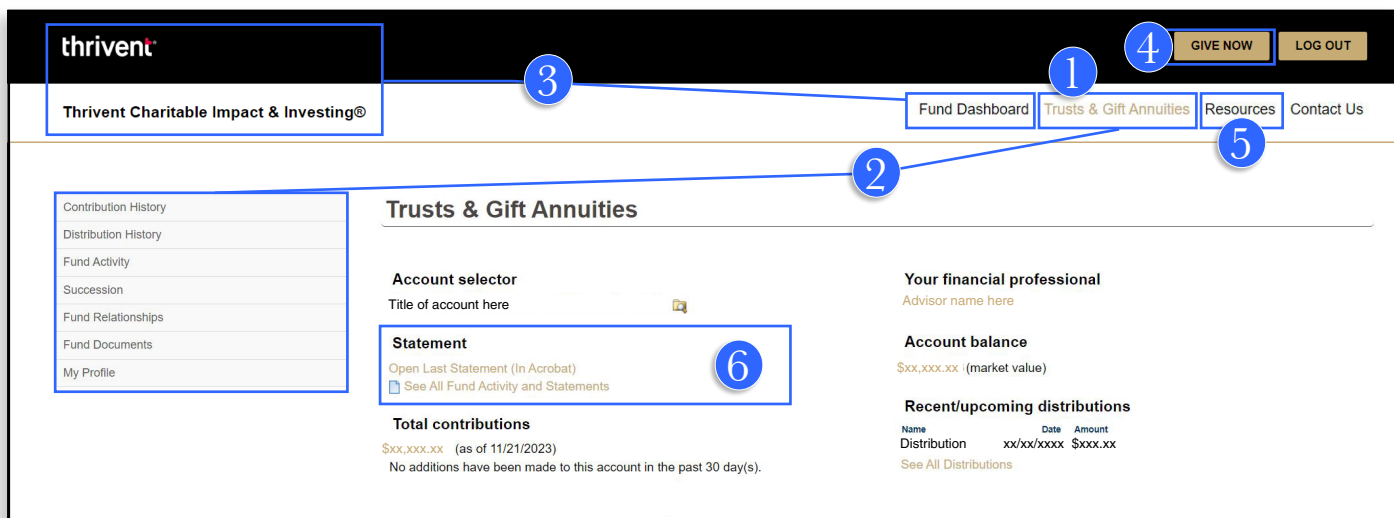


The screenshot shows the Thrivent Fund Dashboard. At the top, there's a navigation bar with 'GIVE NOW' and 'LOG OUT' buttons. Below that, the 'Fund Dashboard' title is followed by a welcome message. The main content area is divided into several sections: 'Your Fund' (showing ID, Fund name, and a 'Change Account' link), 'Fund balance' (showing spendable and market value), 'Total contributions' (showing recent contributions), 'Announcements' (with links to surveys and planning resources), 'Your financial professional' (with an 'Advisor name here' link), 'Quick Links' (with an 'Add To My Fund' button), and 'Statements' (showing 'No statements found' and a link to 'See All Fund Activity and Statements'). A sidebar on the left contains links to 'Fund Activity', 'Investment Allocation', 'Contributions to Fund', 'Grant History', 'Fund Relationships', 'My Documents', and 'My Profile'.

**Fund Dashboard appearance and functionality may vary based on fund type and device.*

Navigation tips

- 1 Click on Trust & Gift Annuities in the top right menu bar to access your trust or gift annuity account.
- 2 Navigate within your account via the drop down menu in the top right or the menu bar on the left.
- 3 You can always access your charitable fund (which will receive the remainder of your trust or gift annuity) by clicking the logo at the top left or by clicking on Fund Dashboard in the top right navigation.
- 4 A "GIVE NOW" button is located on the top bar for easier access to ways to grow your fund.
- 5 A resources page provides quick access to the tools you need to help plan and manage your giving.
- 6 All fund activity and current and historical statements are easy to find.



Have questions?
Connect with us.

thriventcharitable.com

thriventcharitable@thrivent.com

800-365-4172

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