

Charitable fact finder

Thank you for trusting Thrivent Charitable Impact & Investing[®] (Thrivent Charitable) to help spread the joy of generosity to communities around the world. Help your clients along their charitable giving path by starting with these questions regarding their financial security, values, charitable interests and tax considerations.

Start the conversation

- Have you considered giving to charity—either while living or upon death?
- If yes, are you satisfied with what you give? Would you like to give more?
- If no, would you consider leaving money to charity if it would not hurt you or your family financially? What if it could help you or your family financially?
- Would you like to continue giving to charities after death?
- Would you be interested in creating a giving plan with a lasting impact (either during your life or after death)?

Explore ways to give

- What types of charitable giving are currently part of your giving program?
- Are any charities named in your will?
- Do you have any life insurance, annuities or IRAs you could give to charity as beneficiary proceeds—all or a portion?
- Do you have any appreciated assets (securities or real estate) you resist selling because of capital gains taxes?
- Do you have assets set aside you would like to give in exchange for ongoing income payments?
- Would you be interested in making a future substantial gift to charity through smaller, annual gifts that are tax-deductible?
- How do you want your estate shared among family, church/charities and the government? Is there a set amount or upper limit you want to leave your family?

Determine your interests

- Do you actively volunteer with any organizations?
- What organizations/institutions have provided the greatest influence in your life (e.g., church, school/college, community)?
- Do you have favorite charities? What about them appeals to you the most?
- Would your financial support to any organization/charity be missed if it ceased?
- What entities are you most interested in helping? Are there societal issues you wish to address?




Fine-tune the donor's charitable plan

- Do you want a giving plan to provide for a charity during your lifetime or at your death?
- Do you want the charity(ies) to receive a lump sum upon your death or do you want to provide ongoing support?
- Do you want to give anonymously or by name? In memory or in honor of someone?
- Do you want to support multiple charities?
- Do you want to give to a certain program or target a specific geographic area?
- Do you want the flexibility to select different charities over time?

Connect with us

Your clients want to spread the joy of generosity, and Thrivent Charitable gift planners have the expertise to help them create their personalized giving path. Please connect with us to learn how we help your clients make the changes that matter most to them.

 Email: giftplanner@thrivent.com

 Phone: 800-365-4172

Thrivent Charitable Impact & Investing® is a public charity that serves individuals, organizations and the community through charitable planning, donor-advised funds and endowments. Thrivent Charitable Impact & Investing works collaboratively with Thrivent and its financial advisors. It is a separate legal entity from Thrivent, the marketing name for Thrivent Financial for Lutherans.

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