

# Fund Dashboard Recommend Grant Instructions

We celebrate your generosity and hope to make the experience of giving seamless and joyful. The following are general instructions to maximize your generosity and support the charities and causes that matter most to you as you continue your giving journey.

If you have questions, please don't hesitate to reach out to us at [thriventcharitable@thrivent.com](mailto:thriventcharitable@thrivent.com) or 800-365-4172.

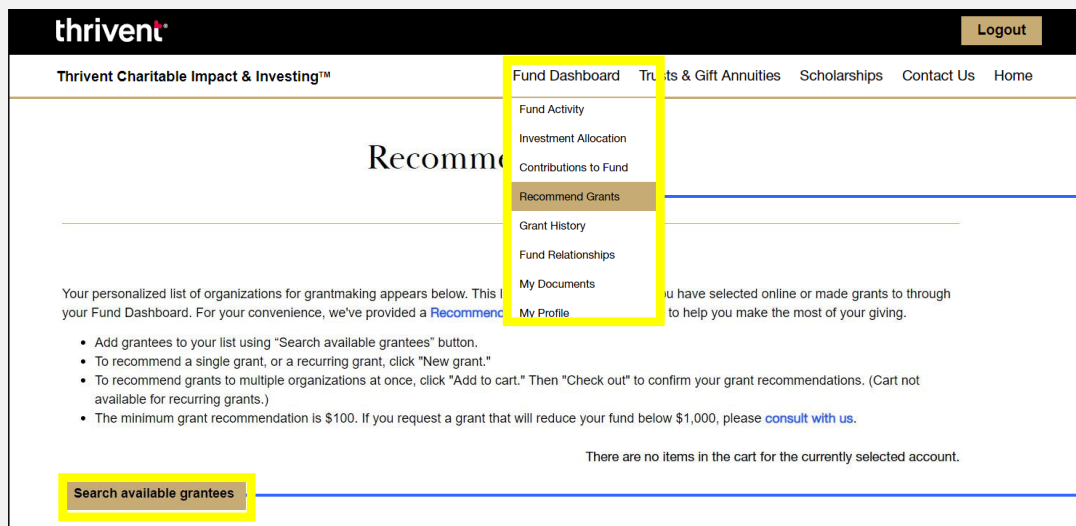
**Thank you for trusting us with your generosity. We are grateful to serve you.**

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# Recommend Grants

- 1 After you have logged into your Fund Dashboard, navigate to the “[Recommend Grants](#)” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “[Recommend Grants](#)” option from the dropdown menu.  
On this page, you will see instructions to recommend a grant, along with some requirements.
- 2 To begin finding information on available grantees and/or adding organizations to your cart, click on “[Search Available Grantees](#)” button.  
*\*See next page for further explanation*



1 Click “[Recommend Grants](#)”

2 Click “[Search Available Grantees](#)”

# Recommend Grants - Add an Organization to Your Grantee List

After you have navigated to the Search Grantee Organizations page you can add an organization to your grantee list. *\*See previous page for reference*

- 1 To add an existing organization to your grantee list, begin by typing in the organization's name or partial name (e.g., try "Salv" instead of "Salvation Army of St. Louis") into the "[Grantee Name](#)" field under the search option.
- 2 You can also refine your search by selecting the organization's state in the "[State](#)" dropdown.
- 3 Click "[Submit](#)" to search, then review your search.
- 4 The search results will provide a list of options. Click on the "[Organization Name](#)" in the search results to add them to your personal Grantee list.

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## Search grantee organizations

**Search grantee organizations**  
Use this page to search for a grantee to add to my grantee list.

- For better results, try entering only the first few characters of the grantee name. (e.g., try "Salv" instead of "Salvation Army of St. Louis").
- If you do not find the grantee you want, try to refine your search by using the state filter or by entering less specific information.
- Leaving the search field blank will return all available charities in the selected state.
- You can also [click here to suggest a new grantee](#).

In the results list, click on the desired organization to add it to my grantee list, or [return to my grantee list](#).

**Fund**  
Fund name #1 here  
Fund name #2 here

**Search**  
Grantee name:  
State:  
ALL  
Submit

Organization Name	Address	Tax ID
Organization Name	Address	Tax ID
Organization Name	Address	Tax ID
Organization Name	Address	Tax ID
Organization Name	Address	Tax ID
Organization Name	Address	Tax ID

1 Enter "[Grantee Name](#)"

2 Select "[State](#)"

3 Click "[Submit](#)"

4 Click "[Organization Name](#)"

# Recommend Grants – Create a Single or Recurring Grant

- 1 Navigate to the “[Recommend Grants](#)” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “[Recommend Grants](#)” option from the dropdown menu.
- 2 To create a single or recurring grant, click on any “[New Grant](#)” button from the list. The Grant Entry page will then load. *\*See next page for reference*

1 Click “[Recommend Grants](#)”

2 Select “[Single Grant Payment](#)” or “[Recurring Grant Payment](#)”

## Recommend Grants – Create a Single or Recurring Grant (Continued)

- 3 Once the Grant Entry screen has loaded (\*See previous page for reference on navigating to this page), select either a “Single Grant Payment” or “Recurring Grant Payment”. If you select recurring, you will have an additional section of choices.
- 4 Enter the “Grant Amount” you would like to recommend. Be aware of the available balance of your fund.
- 5 To select the frequency you would like this grant payment to recur, click on the frequency bar and select one of the dropdown options: “Annually”, “Bi-monthly”, “Monthly”, “Quarterly”, “Semi-annually”.
- 6 After you select the frequency of occurrence, be sure to enter how many times you would like for this payment to occur. To do this, type the “# of Payments”.
- 7 Then select when you would like your first payment to begin using the “Start” date option. The system will calculate the “End” date based on your selections above.

The screenshot shows the 'Recommend Grants' page on the Thrivent website. The page has a header with the Thrivent logo and navigation links. The main section is titled 'Recommend Grants' and contains a 'Grant Entry' form. The form has several sections: 'I would like to recommend a grant to:' with fields for Name and Address; 'Recommended Grant Amount:' with radio buttons for 'As a Single Payment' and 'As a Recurring Payment', a 'Balance' field showing \$293,008.03, and an 'Amount' field showing \$0.00; and 'Recurring Payments:' with a 'Frequency' dropdown menu, a '# of Payments' field, a 'Start' date field, an 'End' date field, and a 'Total Amount' field showing \$0.00. Numbered callouts 3 through 7 point to the following elements: 3 points to the radio buttons for payment type; 4 points to the 'Amount' field; 5 points to the 'Frequency' dropdown menu; 6 points to the '# of Payments' field; and 7 points to the 'Start' date field.

3 Select “Single Grant Payment” or “Recurring Grant Payment”

4 Enter “Grant Amount”

6 Enter “# of Payments”

7 Enter “Start” date

5 Select “Annually”, “Bi-monthly”, etc.

A dropdown menu for selecting the frequency of payments. The menu is currently set to 'Annually'. The options listed are: Annually, Bi-monthly, Monthly, Quarterly, and Semi-annually.

## Recommend Grants – Create a Single or Recurring Grant (Continued)

- 8 Please provide instructions to the grantee organization regarding the “Grant Purpose” of the grant in the text field.
- 9 If you would prefer the grant recommendation remain anonymous, check the “Please make this Grant Recommendation Anonymous” box option.
- 10 Select to whom you would like an “Acknowledgement” sent from the dropdown menu.
- 11 Provide the appropriate name and address in the recommender “Details” field.
- 12 Enter any “Special Instructions” you may have for Thrivent Charitable (not the grantee organization).
- 13 Once all required fields have been completed, click on the “Submit” button.

Other Grant Recommendation Details:

Please note: the information you provide below on grant purpose, acknowledgement, and additional options will be included in the grant letter sent to the organization.

1) **Grant Purpose:** If you have a specific program or initiative to which you would like your grant directed, such as youth ministry, music program or general support, you may indicate that information here.

general support

15 characters used out of a maximum of 255 characters.

2) **Grant acknowledgement and anonymity preferences:** The name of your fund will be shared unless you select to make the grant anonymous. If you want to *receive acknowledgement of your grant from the charitable organization*, please see question 3 for instructions and drop-down selections.

☒ Please make this Grant Recommendation Anonymous.

3) *(Optional)* You may select additional options from the drop-down box below (e.g., for the missionary work of, in honor of, in memory of).

If you would like to receive a confirmation directly from the grantee, select *Please send acknowledgement to*. Please also provide the appropriate name and address for the recommender in the box below your selection.

Acknowledgement or special instructions for grantee

Details such as donor name, address, or missionary's name, etc. from the selection above (e.g. Jane Doe, 123 Main Street, Hometown, ME 12345)

0 characters used out of a maximum of 195 characters.

Special Instructions for Thrivent Charitable Staff

Submit Cancel

8 Enter “Grant Purpose”

9 Select for “Anonymous” option

10 Select “Acknowledgement” recipient

11 Enter recommender “Details”

12 Enter “Special Instructions”

13 Click “Submit”

Acknowledgement or special instructions for grantee

Acknowledgement or special instructions for grantee

For the missionary work of

In honor of

In memory of

On behalf of

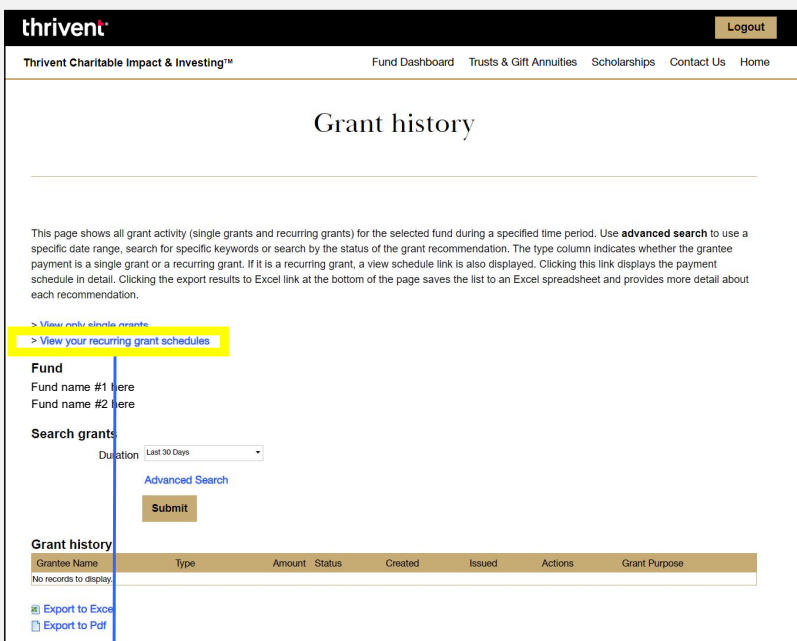
Please send acknowledgement to

Recommended by

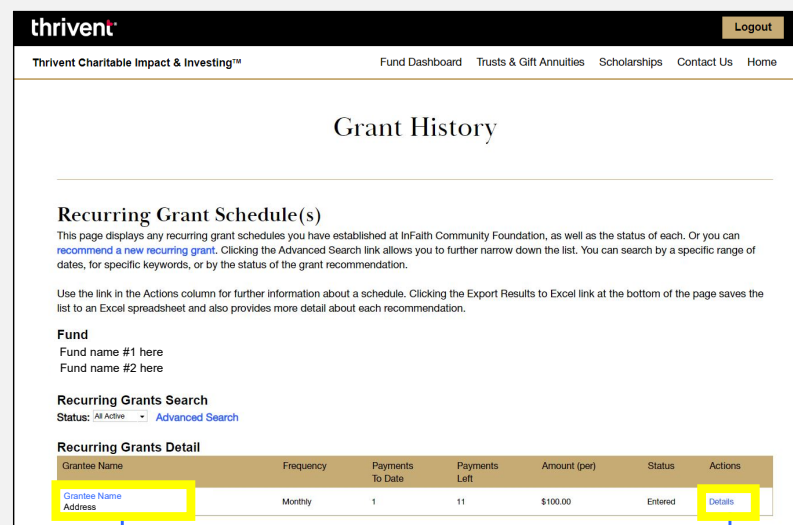
# Recommend Grants – Edit an Existing Recurring Grant

To edit an existing recurring grant, please start by visiting the grant history page. *\*Pictured below on the left*

- 1 To view, edit, or cancel your active recurring grants, click the “[View Your Recurring Grant Schedules](#)” option.
- 2 Once the Recurring Grant Schedule page has loaded, click on the “[Grantee Name](#)” to view details about the grantee organization. *\*See image below on the right side for reference*
- 3 Click on the “[Details](#)” link to view the history of this recurring grant and to edit or cancel the recurring grant.



1 Click “[View Your Recurring Grant Schedules](#)”



2 Click “[Grantee Name](#)”

3 Click “[Details](#)”

# Grant History

- 1 Navigate to the “[Grant History](#)” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “[Grant History](#)” option from the dropdown menu.
- 2 To make changes to the recurring grant, amount, instructions, etc., or to cancel the grant, click the “[Back](#)”, “[Edit](#)”, or “[Cancel](#)” button.  
**Note:** These changes will only affect future grants, not any grants in the past.
- 3 To extend the dates of your recurring grant, click the “[Cancel & Recreate](#)” button. A new recurring grant will appear with all the same details as the current one. **Note:** Once you click this button the existing recurring grant WILL be cancelled.
- 4 To view more details about a single occurrence of the recurring grant, click the “[View](#)” option.

**thrivent** Logout

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Fund Activity  
Investment Allocation  
Contributions to Fund  
Recommend Grants  
**Grant History**  
Fund Relationships  
My Documents  
My Profile

## Recurring Grant Details

**Grantee Name**  
**Address**

[Schedule](#)  
From 10/21/2021 to 9/21/2022 Monthly for \$100.00

**Purpose**  
Entered

**Status**  
Entered

[Back](#) [Edit](#) [Cancel](#) [Cancel & Recreate](#)

**Payments to Date**

ID	Status	Amount	Created	Scheduled	Issued	Cleared	Actions
ID#	Posted	\$834.55	9/6/2019	9/20/2019	9/10/2019	9/17/2019	<a href="#">View</a>
ID#	Posted	\$1,833.48	9/6/2020	9/20/2020	9/15/2020	9/23/2020	<a href="#">View</a>

1 Click “[Back](#)”, “[Edit](#)”, or “[Cancel](#)”

2 Click “[Back](#)”, “[Edit](#)”, or “[Cancel](#)”

3 Click “[Cancel & Recreate](#)”

4 Click “[View](#)”



## Recommend Grants – Add a Grant to Your Cart

- 1 Navigate to the “[Recommend Grants](#)” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “[Recommend Grants](#)” option from the dropdown menu.
- 2 To make a single one-time grant or a recurring grant, click the “[New Grant](#)” button. *\*This will open the screen on the next page*
- 3 If you will be making more than one grant, use the grant cart functionality by clicking on “[Add to Cart](#)”.
- 4 Clicking the “[X](#)” will remove an organization from your grantee list. This will not delete the organization, but simply remove it from your list.

The screenshot displays the 'FUND DASHBOARD' page. A yellow box highlights the left-hand navigation menu, which includes options like 'Fund Dashboard', 'Trusts', 'Gift Annuities', 'Scholarships', 'Contact Us', 'Home', 'Fund Activity', 'Investment Allocation', 'Contributions to Fund', 'Recommend Grants' (highlighted), 'Grant History', 'Fund Relationships', 'My Documents', and 'My Profile'. A blue arrow points from the instruction 'Click "Recommend Grants"' to the 'Recommend Grants' link.

Below the navigation menu, there's a section titled 'Your personalized list of organizations for grantmaking appears below your Fund Dashboard.' followed by instructions and a list of steps:

- Add grantees to your list using "Search available grantees" button
- To recommend a single grant, or a recurring grant, click "New Grant"
- To recommend grants to multiple organizations at once, click "Add to cart." Then "Check out" to confirm your grant recommendations. (Cart not available for recurring grants.)
- The minimum grant recommendation is \$100. If you request a grant that will reduce your fund below \$1,000, please consult with us.

A message states: 'There are no items in the cart for the currently selected account.'

Below this, there's a 'Search available grantees' button and a 'Fund' section with input fields for 'Fund name #1 here' and 'Fund name #2 here'.

The main section is titled 'My grantee list' and contains a table with columns 'Grantee' and 'Remove Charity'.

Grantee	Remove Charity
<b>New Grant</b>	
Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X
<b>New Grant</b> Grantee Name Address Add to Cart X	X

Four numbered blue arrows point to specific elements in the table:

- Click "New Grant"
- Click "Add to Cart"
- Click "X"
- Click "X"

# Recommend Grants – Add a Grant to Your Cart (Continued)

Clicking on the “[New Grant](#)” button will bring you to the below page. *\*See previous page for reference*

- 5 Enter the “[Grant Amount](#)”.
- 6 Enter “[Instructions](#)” to the grantee organization regarding the purpose of the grant.
- 7 If you have any special “[Instructions](#)” to Thrivent Charitable (not the grantee organization) enter it here.
- 8 By clicking “[Close](#)” you will return to the main Grant page without saving the item to your cart.
- 9 By clicking “[Save Changes](#)”, the grant will be added to your cart, and you will return to the main Grant page.
- 10 When you are finished making grants and ready to check out, click on “[Save Changes & Go to Cart](#)”. *\*See next page for cart*

The screenshot shows a web form titled "Fund name #1 here" with a sub-header "Add To Cart". The form contains several sections: "Organization: Name", "Amount" (with a yellow box and callout 5), "Purpose" (with a yellow box and callout 6), "Grant acknowledgement and anonymity preferences", "3) (Optional) You may select additional options from the drop-down box below", "Details such as donor name, address, or missionary's name, etc.", and "Special Note" (with a yellow box and callout 7). At the bottom of the form are three buttons: "Close", "Save Changes", and "Save Changes & Go to Cart". A separate box on the right contains callouts 8, 9, and 10 pointing to these buttons respectively.

5 Enter “[Grant Amount](#)”

6 Enter “[Instructions](#)” (to grantee org regarding purpose)

7 Enter “[Instructions](#)” (to Thrivent)

8 Click “[Close](#)”

9 Click “[Save Changes](#)”

10 Click “[Save Changes & Go to Cart](#)”

# Recommend Grants – Grant Cart Detail

Once you arrive at your cart, you can still modify your options. *\*See previous page for reference of how to navigate to your cart*

- 1 To modify your Grants from your cart, click “[Edit | Remove](#)”
- 2 If you have made changes, remember to click “[Update Cart](#)” to save them
- 3 To add another grant currently not in your cart, click “[Add Another Charity](#)”.
- 4 When you are finished, click “[Check Out](#)”.

The screenshot shows the 'thrivent' website interface. At the top, there's a navigation bar with 'thrivent' logo and a 'Logout' button. Below it, a secondary navigation bar lists 'Thrivent Charitable Impact & Investing™', 'Fund Dashboard', 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. The main content area displays the 'Current Grant Cart Subtotal: \$500.00' and 'Fund name #1 here 1 item(s) in your cart'. A button labeled 'Edit cart or Check out' is visible. Below this, the 'Your Grant Cart' section explains that it lists all grant recommendations and provides instructions on how to edit or remove grants. A note states: 'NOTE: Any time you make a change on this page, you must click the "Update" button to save your changes.' A table lists the grant details:

Grantee Name	Amount	Grant Purpose	Anonymous	Actions
Name	\$500.00	general support	Y	<a href="#">Edit   Remove</a>
	\$500.00			

Below the table, it shows 'Number of grants: 1', 'Total Amount: \$500.00', and 'Spendable Balance: \$xxx,xxx.xx'. At the bottom, there are four buttons: 'Update Cart', 'Add Another Charity', 'Check Out', and 'Edit cart or Check out'.

1 Click “[Edit | Remove](#)”

2 Click “[Update Cart](#)”

3 Click “[Add Another Charity](#)”

4 Click “[Check Out](#)”

## Recommend Grants – Grant Cart Detail (Continued)

After clicking the check out option, you will be shown a summary page for a final review (see below).

- 5 Click on “[Confirm and Submit](#)” to finalize your grant.

**Please note:** Your grant request is NOT submitted until you click the Confirm and Submit button.

- 6 To cancel this recommendation, click the “[Cancel](#)” button.

**Confirm Grant Recommendations**  
**NOTE: Your grant request is NOT submitted until you click the Confirm and Submit button (below).** Clicking “Cancel” will take you back to your cart.

I understand that while the vast majority of grant recommendations can be honored by Thrivent Charitable, here are common types of grant requests that cannot be made:

1. Grants that provide a more than incidental benefit to the donor or other third party. This includes: all or a portion of the cost to attend a charitable event or banquet, goods bought at charitable auctions, raffle tickets, grants to satisfy a financial obligation or any individual or entity, grants that fulfill fundraising or other commitments or pledges, or that are directed to or for the benefit of specific individuals (e.g., school tuition, scholarships earmarked for individuals);
2. Grants to organizations whose purpose or work is not solely charitable or when the grant will be used for a non-charitable purpose (e.g., cemeteries, VFW, fraternal societies);
3. Grants to private non-operating foundations;
4. Grants to supporting organizations (501(c)(3)s identified in 509(a)(3) that do not have an IRS determination letter stating they are “Type I” or “Type II”.

By clicking the Confirm and Submit button, I recommend the grant(s) listed above. I understand that this recommendation does not represent the payment of any pledge or other financial obligation, nor provides any impermissible benefits.

Account: Fund name here

Grantee Name	Amount	Grant Purpose	Anonymous
Name	\$500.00	general support	Y
	\$500.00		

Number of transactions  
1

Total Amount \$500.00

Spendable Balance \$293,008.03

[Cancel](#) [Confirm and Submit](#)

5 Click “[Confirm and Submit](#)”

6 Click “[Cancel](#)”



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**Questions?** Please don't hesitate to contact our team for additional assistance at [thriventcharitable@thrivent.com](mailto:thriventcharitable@thrivent.com) or call 800-365-4172.

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