thrivent

Thrivent Charitable Impact & Investing®

Fund Dashboard Reference Guide - Charitable Trusts & Gift Annuities

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 or 800-365-4172.

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

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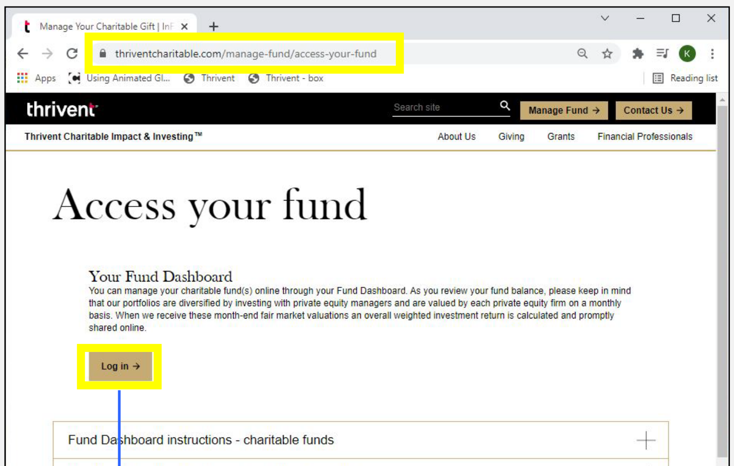
First Time Login Instructions

You can access your charitable fund(s) online through your fund dashboard where you can view your fund balances and activity, recent fund statements, and other important documents.

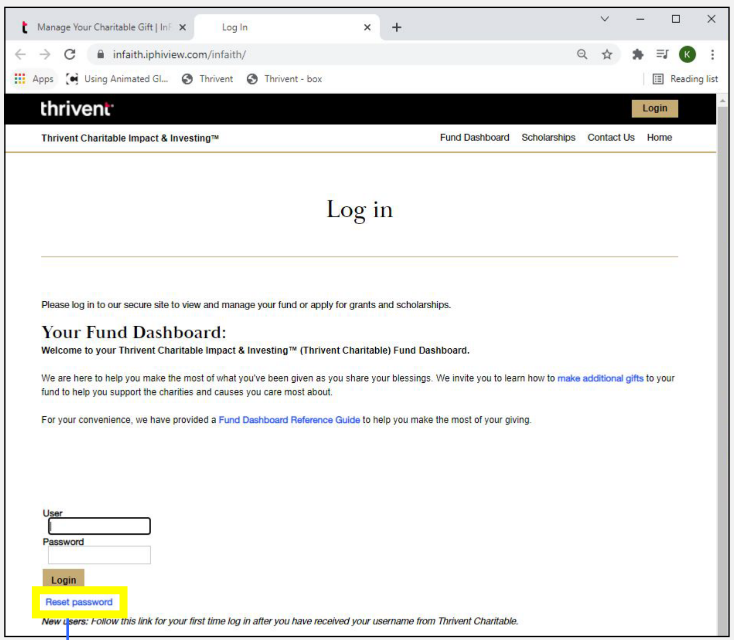
To log in for the first time, go to [https://www.thriventcharitable.com/manage-fund/access-your-fund.](https://www.thriventcharitable.com/manage-fund/access-your-fund)

1 Once you arrive at the Access Your Fund page, click “Log In”.

2 Once you arrive at the Log In screen, select “Reset Password”.



1 Click “Log In”



2 Select “Reset Password”

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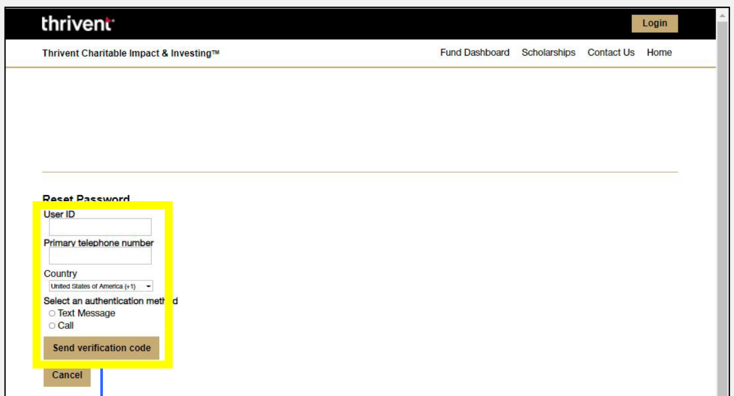
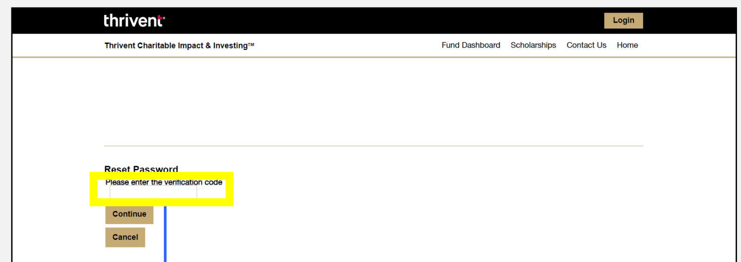
Verifying Your Account

After clicking on reset password, you will be directed to the Reset Password screen

1. Here, you will need to enter the "Username" you received in your Welcome Email from Thrivent Charitable and the "Primary Telephone Number" that you provided to Thrivent Charitable that you can receive a verification code on.
2. You can select to receive a text-based ("Text Message") authentication code, or you can select to receive a phone "Call" with a verbal authentication code.
3. Once you select the method of receipt, click on the "Send Verification Code" button.
4. Once the Authentication screen loads, enter the "Authentication Code" you received via a phone call or text message.



1. Enter "Username" & "Primary Telephone Number"
2. Select "Text Message" or "Call"
3. Click "Send Verification Code"



4. Enter the "Authentication Code"

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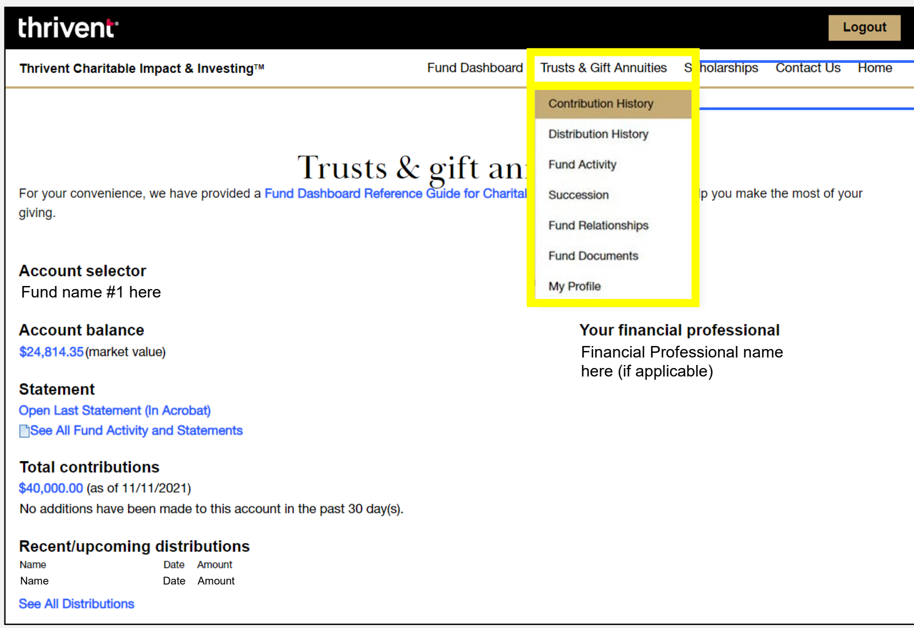
Trusts & gift Annuities Fund Overview

The “Trusts & Gift Annuities” tab has several subpages with detailed information. These pages can be accessed by:

1 Clicking on the menu “Trusts & Gift Annuities”

2 Navigating to one of the subpages (i.e., “Contribution History” page, as pictured below)



1 Click “Trusts & Gift Annuities”

2 Navigate to subpage (i.e., “Contribution History” page, as pictured)

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Contribution History

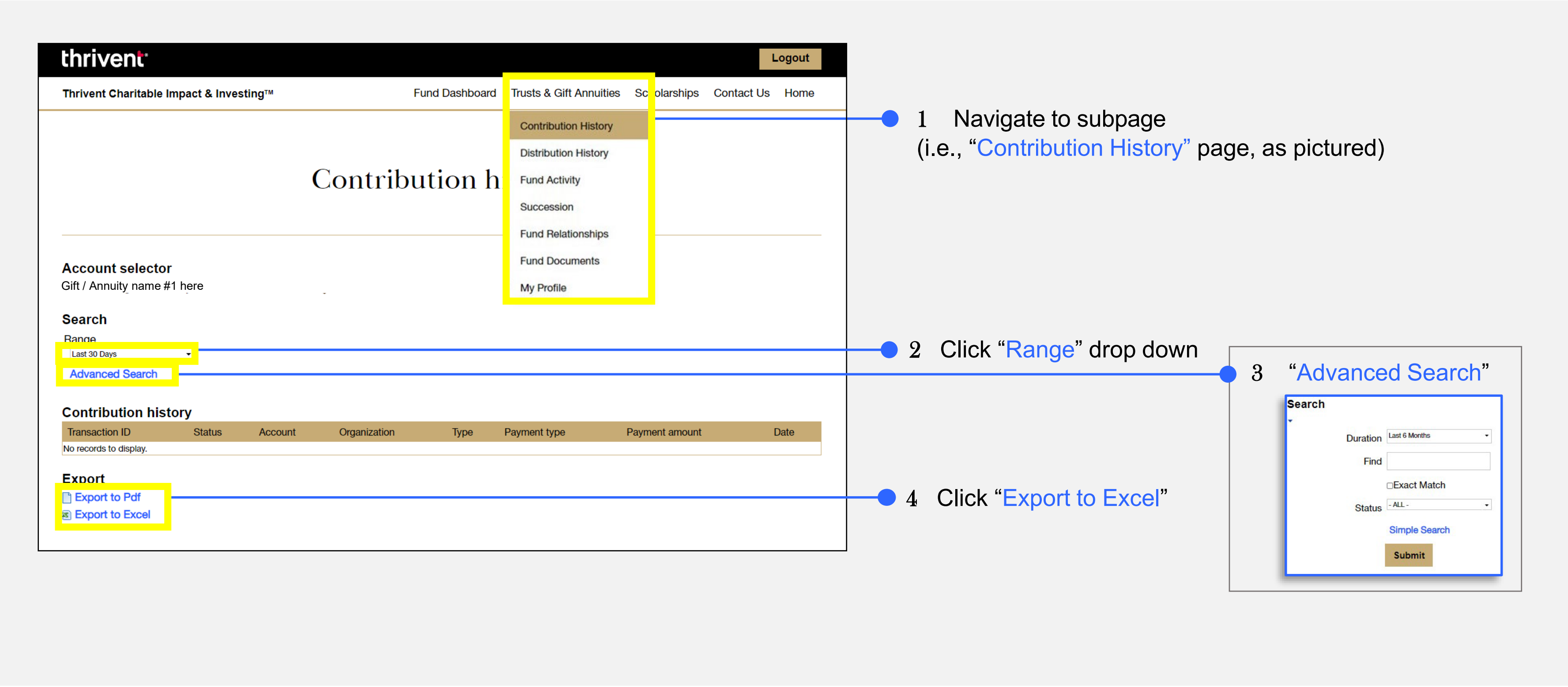
1 Navigate to the “Contribution History” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “Contribution History” option from the dropdown menu.

The Contribution History page provides the history of your contributions to a selected gift annuity or trust.

2 To change the time range that the search pulls from, pick an option from the “Range” dropdown menu.

3 To set a specific date range, search for specific keywords, or search by the status of the contribution, click on “Advanced Search” to allow for an advanced search option to expand. Once this option has expanded, you may refine your search.

4 Clicking the “Export to Excel” link at the bottom of the page saves the list to an Excel spreadsheet. This export will also provide more detail about each transaction within the spreadsheet after the export has finished.



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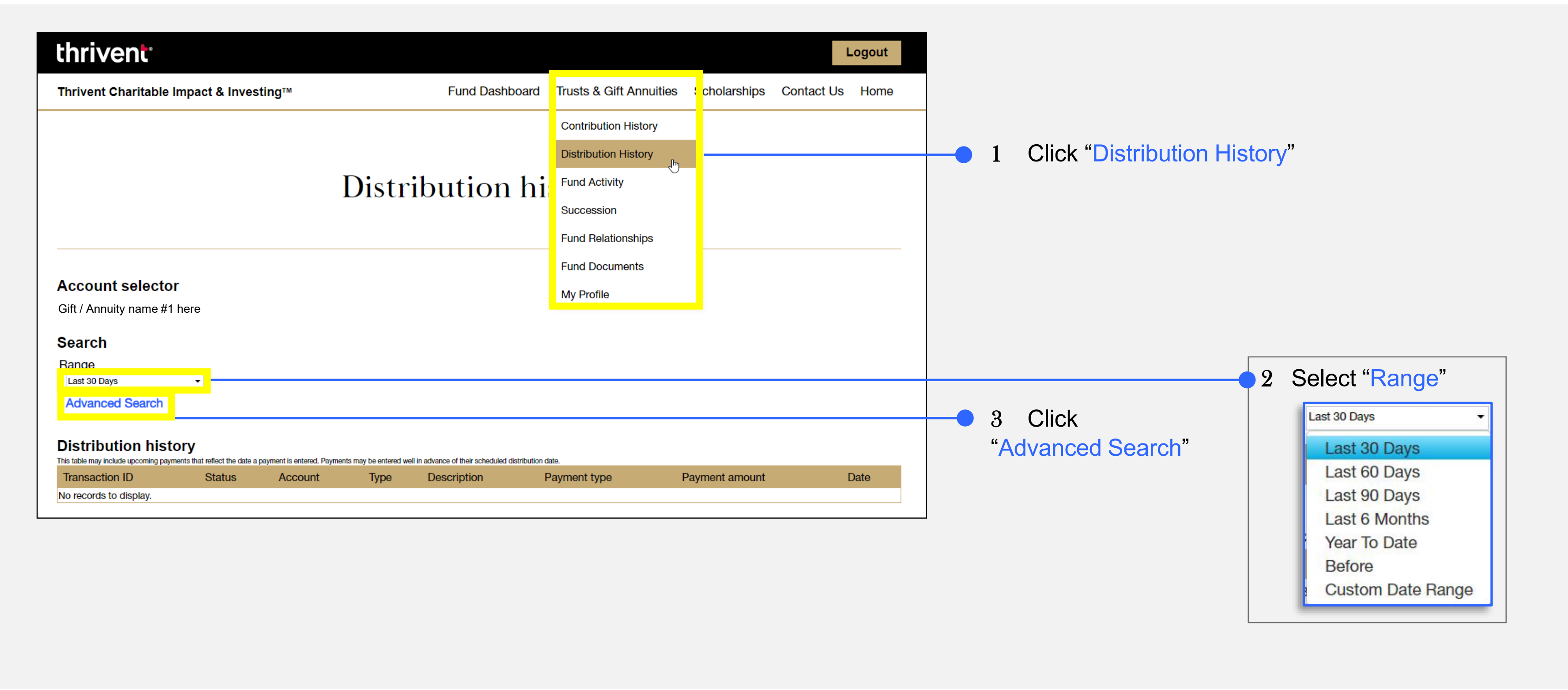
Distribution History

1 Navigate to the “Distribution History” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “Distribution History” option from the dropdown menu.

On this page, you can easily view the history of your distributions from your selected gift annuity or trust and display the information by custom date ranges.

2 To change the time range for your search, select an option from the dropdown menu under “Range”. Options include 30 days, 60 days, 90 days, 6 months, or the last year.

3 Click the “Advanced Search” option to enter a custom date range.



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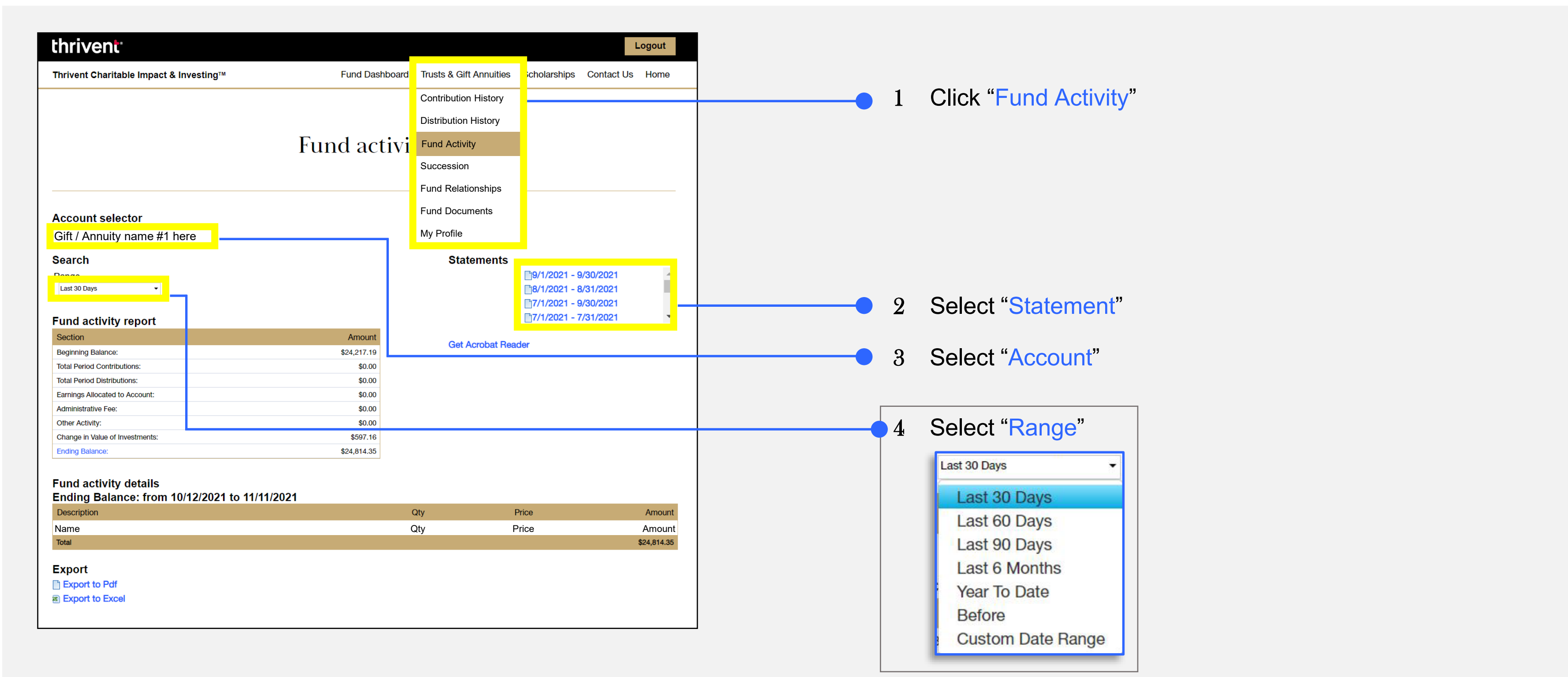
Fund Activity

1 Navigate to the "Fund Activity" page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the "Fund Activity" option from the dropdown menu.

2 To view statements by month, quarter, year, select a "Statement" option from the scroll down menu on the right.

3 If you have more than one trust/gift annuity account, you can switch between them under the "Account Selector" section.

4 To see information on your contributions, distributions, fees, and the ending balance, select a date "Range" on your Fund Activity page.



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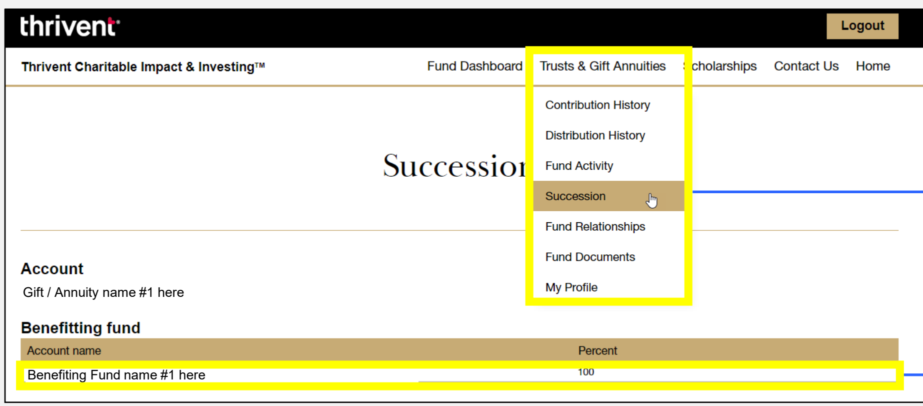
Succession

1 Navigate to the "Succession" page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the "Succession" option from the dropdown menu.

2 This page displays the donor-advised "Fund" that will receive the remainder of your trust or gift annuity once the term of the trust or gift annuity is complete.



1 Click "Succession"

2 "Fund" Name

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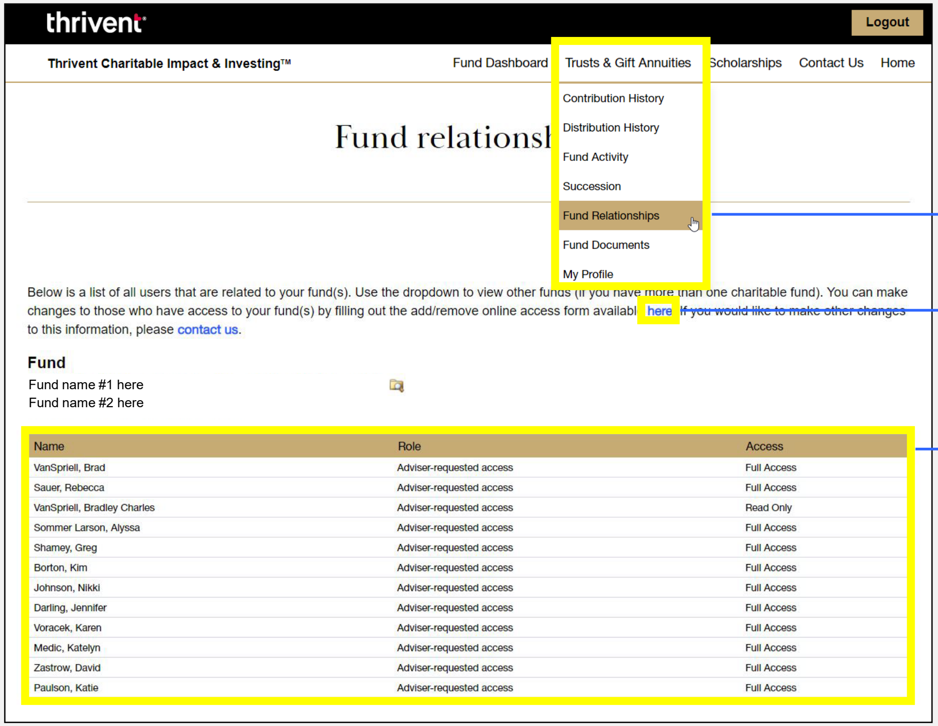
Fund Relationships

1 Navigate to the “Fund Relationships” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “Fund Relationships” option from the dropdown menu.

Fund relationships is a simple way to view all those you have indicated as associated with your fund and what level of access you have given them.

2 If you would like to make changes to this list, click on the “Here” link.

3 You can view “Details” such as the name of individuals (Thrivent Financial Advisors) who currently have access to your fund, their roles, and their access levels.



1 Click “Fund Relationships”

2 Click “Here”

3 “Details”

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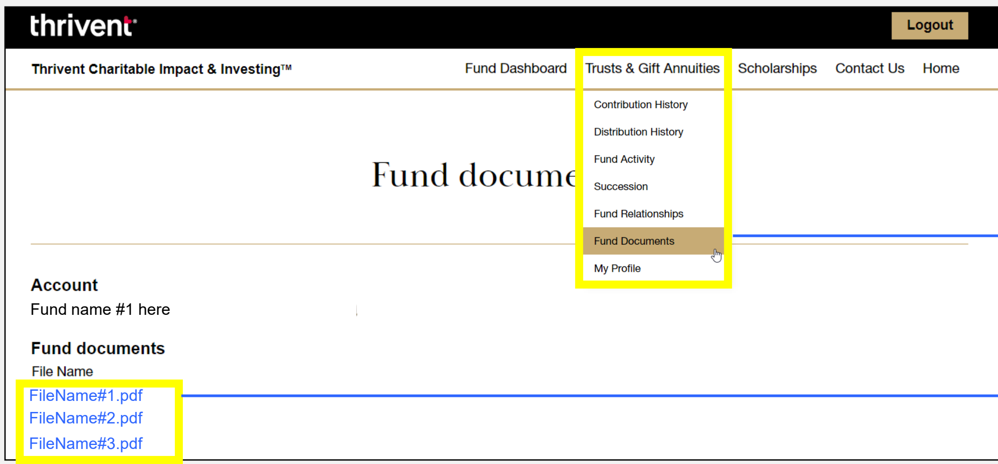
Fund Documents

1 Navigate to the “Fund Documents” page by clicking on the Trusts & Gift Annuities option in the top navigation bar and selecting the “Fund Documents” option from the dropdown menu.

2 On the Fund Documents page, you will find documentation related to your fund such as your original Fund Agreement and Tax Packet.

Note: Monthly and quarterly statements can be found on the Fund Activity page.



1 Click “Fund Documents”

2 Fund Agreement & Tax Packet

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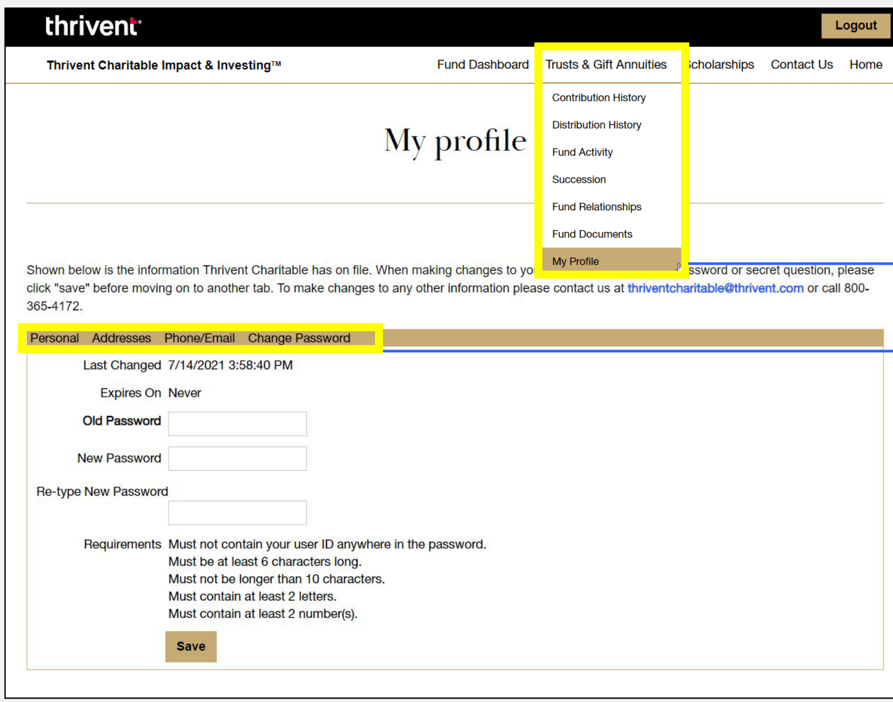
My Profile

1 Navigate to the “My Profile” page by clicking on the Trusts & Gift Annuities option in the top navigation bar and selecting the “My Profile” option from the dropdown menu.

This page contains information about you.

2 You can make changes to your address, phone, email, username, or password by clicking on that topic on the gold navigation bar: “Addresses”, “Phone/Email”, or “Change Password”

**Please see an example of navigating to a topic from the gold navigation bar on the following page*



1 Click “My Profile”

2 Click “Addresses”, “Phone/Email”, or “Change Password”

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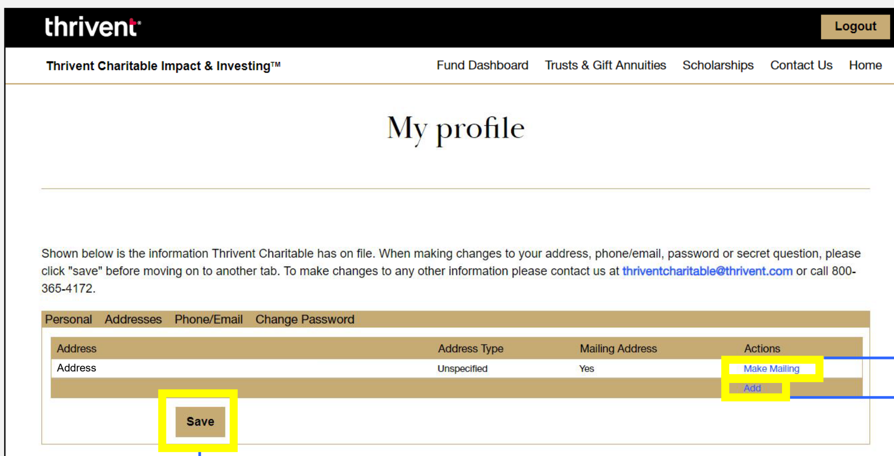
My Profile (Continued)

Below is an example of navigating to the Addresses topic from the gold navigation bar. **See previous page for reference*

Once the addresses tab from the gold navigation bar has opened to view, you can make updates to it.

1. This is also where you will review your addresses and click the "Make Mailing" for the address where you wish to receive any correspondence from Thrivent Charitable.
2. To add a new address, click the "Add" button.
3. Once you have made the necessary updates, click the "Save" button to submit these changes.



1 Click "Make Mailing"

2 Click "Add"

3 Click "Save"

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