

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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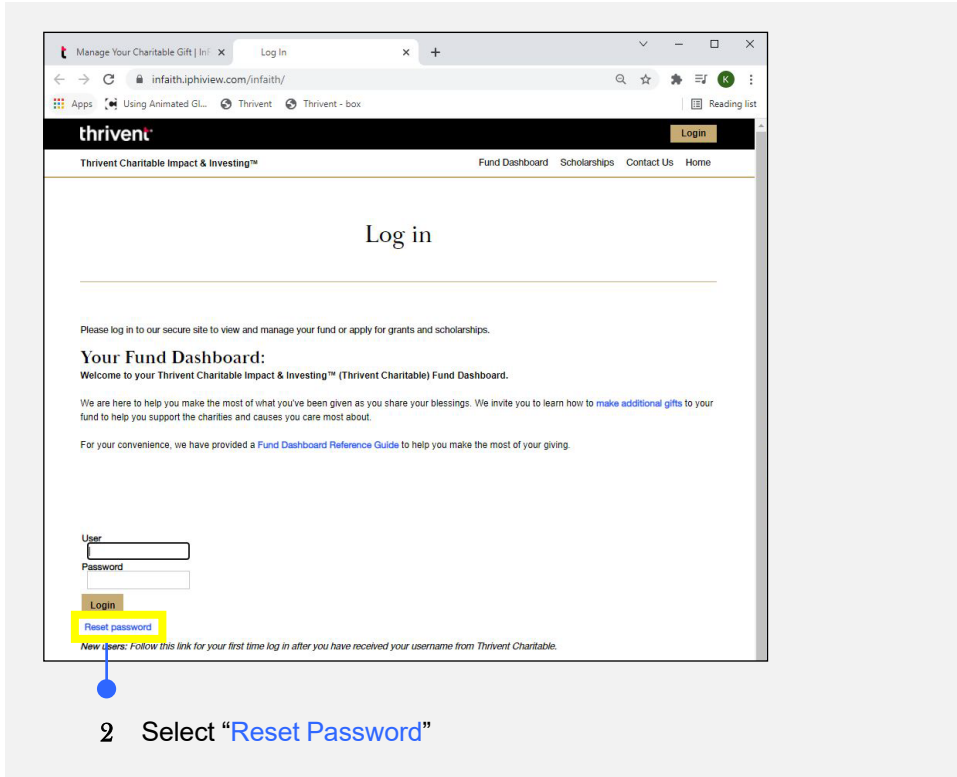
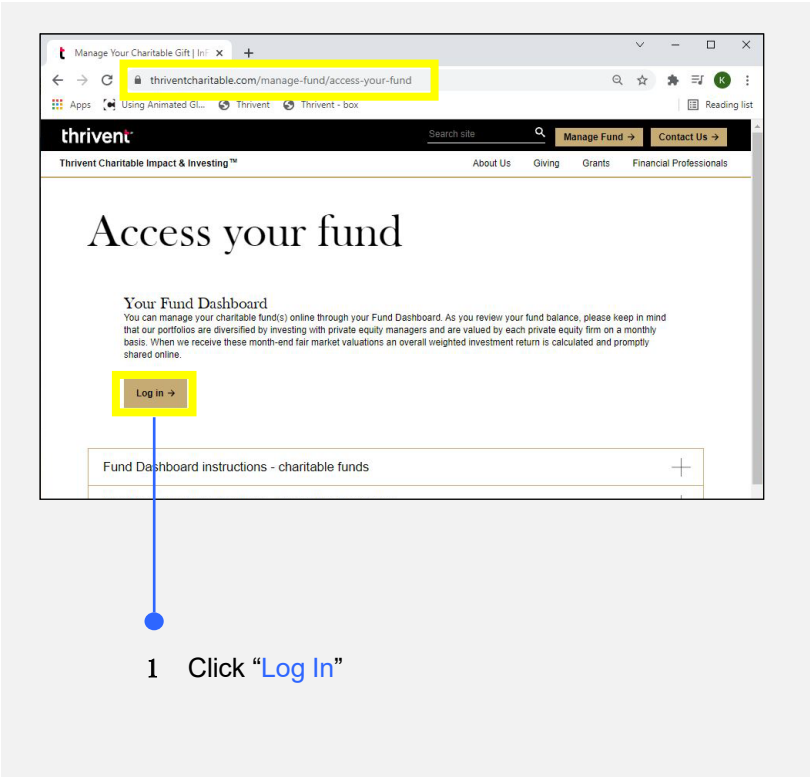
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First Time Login Instructions

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>.

- 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”.



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.

thrivent™ Login

Thrivent Charitable Impact & Investing™ Fund Dashboard Scholarships Contact Us Home

Reset Password

User ID

Primary telephone number

Country
United States of America (x 1)

Select an authentication method

☐ Text Message

☐ Call

Send verification code

Cancel

- 1 Enter “Username” & “Primary Telephone Number”
- 2 Select “Text Message” or “Call”
- 3 Click “Send Verification Code”

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Reset Password

Please enter the verification code

Continue

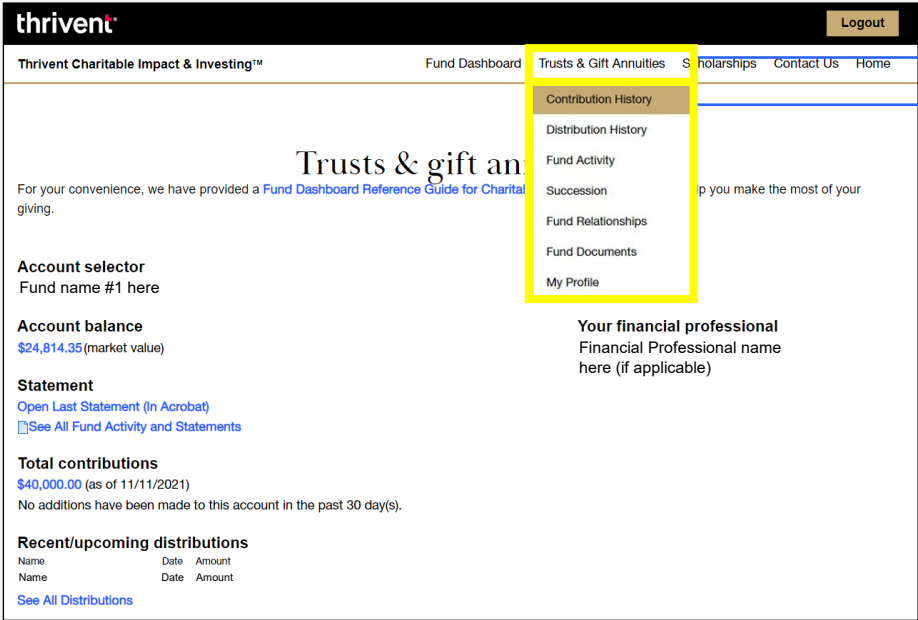
Cancel

- 4 Enter the “Authentication Code”

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)



The screenshot shows the Thrivent Charitable Impact & Investing Fund Dashboard. The 'Trusts & Gift Annuities' menu is highlighted in yellow, and the 'Contribution History' subpage is selected. The dashboard displays account information, including the account balance (\$24,814.35), statement, and total contributions (\$40,000.00). The 'Recent/upcoming distributions' section is also visible.

- 1 Click “Trusts & Gift Annuities”
- 2 Navigate to subpage (i.e., “Contribution History” page, as pictured)

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.

The screenshot displays the Thrivent website's Contribution History page. The top navigation bar includes 'Thrivent Charitable Impact & Investing™', 'Fund Dashboard', 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. A dropdown menu under 'Trusts & Gift Annuities' is highlighted with a yellow box, showing options like 'Contribution History', 'Distribution History', 'Fund Activity', 'Succession', 'Fund Relationships', 'Fund Documents', and 'My Profile'. The main content area is titled 'Contribution h'. Below this is an 'Account selector' with a text input field. A 'Search' section contains a 'Range' dropdown menu (set to 'Last 30 Days') and an 'Advanced Search' link. The 'Contribution history' section features a table with columns: Transaction ID, Status, Account, Organization, Type, Payment type, Payment amount, and Date. Below the table is an 'Export' section with links for 'Export to Pdf' and 'Export to Excel'. An inset on the right shows the expanded 'Advanced Search' form with fields for 'Duration' (set to 'Last 6 Months'), 'Find' (text input), 'Exact Match' (checkbox), 'Status' (dropdown), and a 'Submit' button.

1 Navigate to subpage (i.e., “[Contribution History](#)” page, as pictured)

2 Click “[Range](#)” drop down

3 “[Advanced Search](#)”

4 Click “[Export to Excel](#)”

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.

The screenshot shows the Thrivent website interface. The top navigation bar includes 'Thrivent Charitable Impact & Investing™', 'Fund Dashboard', 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. A 'Logout' button is in the top right. A dropdown menu under 'Trusts & Gift Annuities' is open, showing options: 'Contribution History', 'Distribution History' (highlighted), 'Fund Activity', 'Succession', 'Fund Relationships', 'Fund Documents', and 'My Profile'. Below the navigation, the page title 'Distribution history' is visible. The 'Account selector' section prompts for 'Gift / Annuity name #1 here'. The 'Search' section has a 'Range' dropdown (set to 'Last 30 Days') and an 'Advanced Search' button. The 'Distribution history' section shows a table with columns: Transaction ID, Status, Account, Type, Description, Payment type, Payment amount, and Date. The table currently displays 'No records to display.'.

1 Click “[Distribution History](#)”

2 Select “[Range](#)”

3 Click “[Advanced Search](#)”

Range dropdown options: Last 30 Days, Last 60 Days, Last 90 Days, Last 6 Months, Year To Date, Before, Custom Date Range.

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.

1 Click “Fund Activity”

2 Select “Statement”

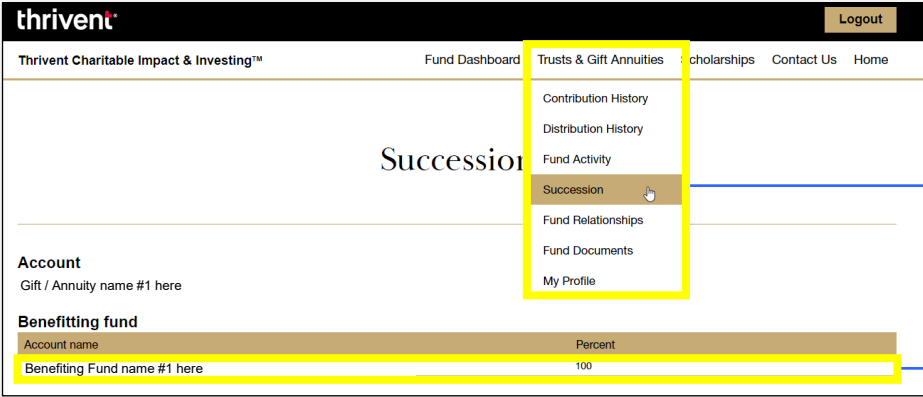
3 Select “Account”

4 Select “Range”

The screenshot shows the Thrivent Charitable Impact & Investing™ Fund Dashboard. The top navigation bar includes 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. The 'Fund Activity' page is displayed, featuring an 'Account selector' section with a dropdown menu for 'Gift / Annuity name #1 here'. Below this is a 'Search' section with a 'Range' dropdown menu. The 'Fund activity report' section displays a table with columns for 'Section' and 'Amount'. The 'Fund activity details' section shows the 'Ending Balance: from 10/12/2021 to 11/11/2021' and a table with columns for 'Description', 'Qty', 'Price', and 'Amount'. The 'Export' section includes links for 'Export to Pdf' and 'Export to Excel'.

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.



The screenshot shows the Thrivent website's Succession page. A yellow box highlights the 'Succession' option in the 'Trusts & Gift Annuities' dropdown menu. A blue line connects this box to the annotation '1 Click “Succession”'. Another yellow box highlights the 'Benefiting Fund name #1 here' field in the 'Benefitting fund' table. A blue line connects this box to the annotation '2 “Fund” Name'.

Account name	Percent
Benefiting Fund name #1 here	100

1 Click “[Succession](#)”

2 “[Fund](#)” Name

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.

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Logout

Thrivent Charitable Impact & Investing™

Fund Dashboard

Trusts & Gift Annuities

Scholarships

Contact Us

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Fund relationships

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Fund Documents

My Profile

Below is a list of all users that are related to your fund(s). Use the dropdown to view other funds (if you have more than one charitable fund). You can make changes to those who have access to your fund(s) by filling out the add/remove online access form available [here](#). If you would like to make other changes to this information, please [contact us](#).

Fund
Fund name #1 here
Fund name #2 here

Name	Role	Access
VanSpriell, Brad	Adviser-requested access	Full Access
Sauer, Rebecca	Adviser-requested access	Full Access
VanSpriell, Bradley Charles	Adviser-requested access	Read Only
Sommer Larson, Alyssa	Adviser-requested access	Full Access
Shamey, Greg	Adviser-requested access	Full Access
Borton, Kim	Adviser-requested access	Full Access
Johnson, Nikki	Adviser-requested access	Full Access
Darling, Jennifer	Adviser-requested access	Full Access
Voracek, Karen	Adviser-requested access	Full Access
Medic, Katelyn	Adviser-requested access	Full Access
Zastrow, David	Adviser-requested access	Full Access
Pautson, Katie	Adviser-requested access	Full Access

1 Click “Fund Relationships”

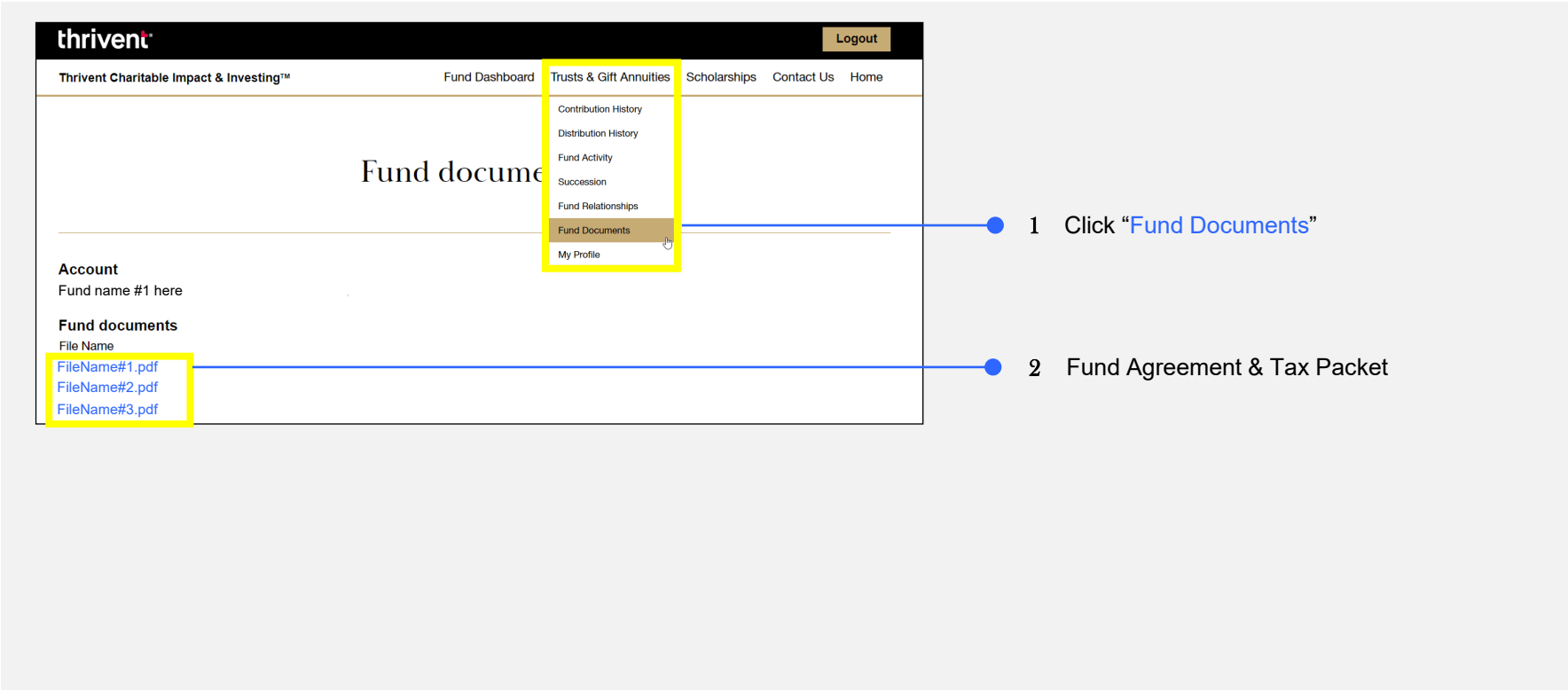
2 Click “Here”

3 “Details”

Fund Documents

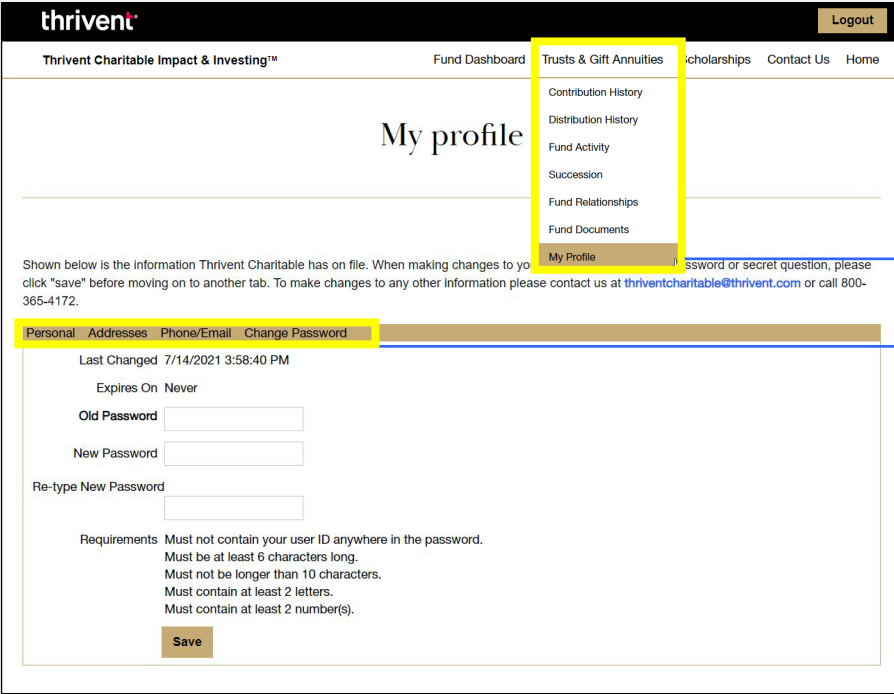
- 1 Navigate to the “Fund Documents” page by clicking on the Trusts & Gift Annuities option in the top navigation bar and selecting the “Fund Documents” option from the dropdown menu.
- 2 On the Fund Documents page, you will find documentation related to your fund such as your original Fund Agreement and Tax Packet.

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



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](#)”

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.

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Logout

Thrivent Charitable Impact & Investing™Fund DashboardTrusts & Gift AnnuitiesScholarshipsContact UsHome

My profile

Shown below is the information Thrivent Charitable has on file. When making changes to your address, phone/email, password or secret question, please click "save" before moving on to another tab. To make changes to any other information please contact us at thriventcharitable@thrivent.com or call 800-365-4172.

PersonalAddressesPhone/EmailChange Password

Address	Address Type	Mailing Address	Actions
Address	Unspecified	Yes	<div>Make Mailing</div> <div>Add</div>

Save

1 Click “[Make Mailing](#)”

2 Click “[Add](#)”

3 Click “[Save](#)”



**Thrivent Charitable
Impact & Investing®**

Questions? Please don't hesitate to contact our team for additional assistance at thriventcharitable@thrivent.com or call 800-365-4172.

Thrivent Charitable Impact & Investing®, a separate legal entity from Thrivent, the marketing name for Thrivent Financial for Lutherans, 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 professionals.