

Fund Dashboard Reference Guide

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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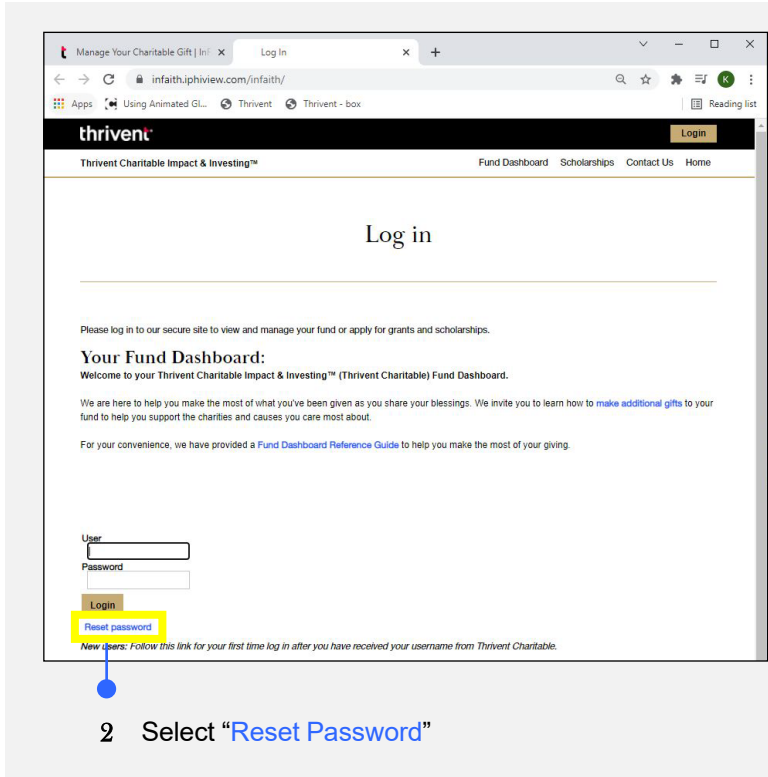
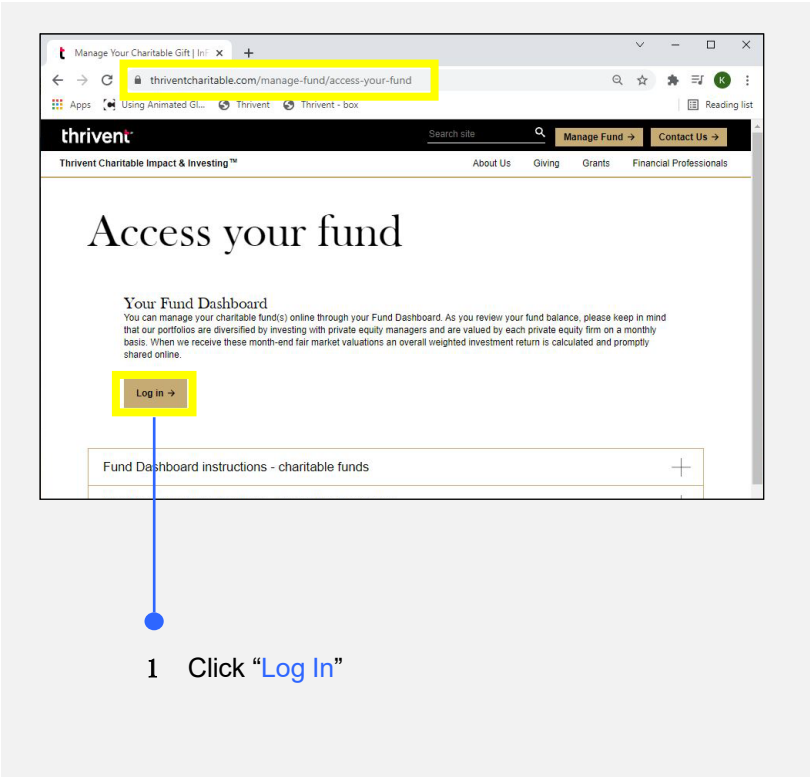
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First Time Login Instructions

You can access your charitable fund(s) online through your fund dashboard. Here, 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>.

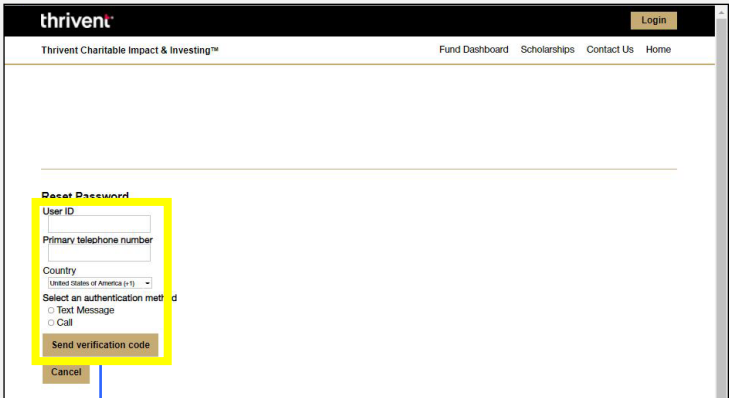
- 1 Once you arrive at the Access Your Fund page, click “Log In”.
- 2 Once you arrive at the Log In screen, select “Reset Password”.



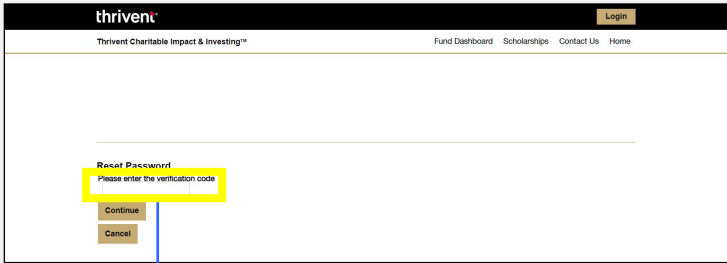
Verifying Your Account

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.



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

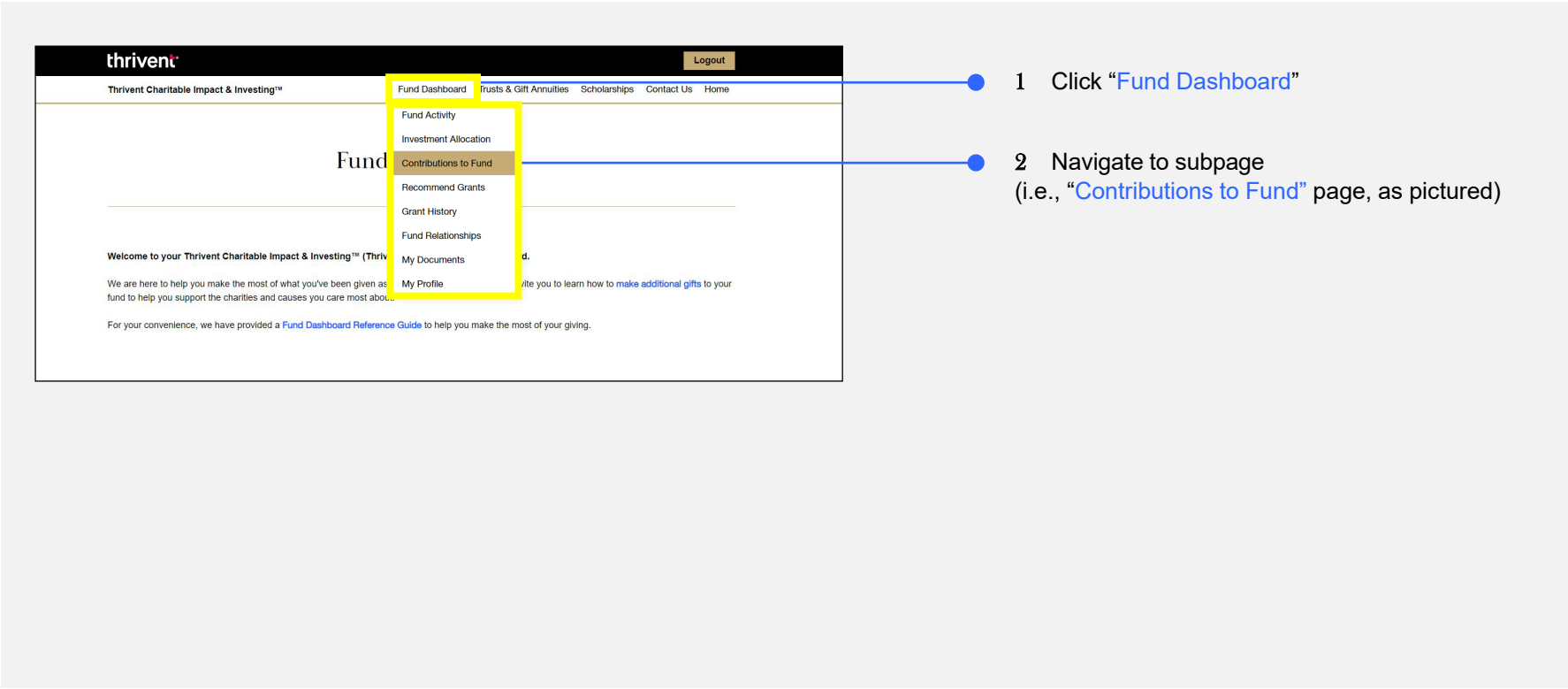


- 4 Enter the “Authentication Code”

Navigating Your Fund Dashboard

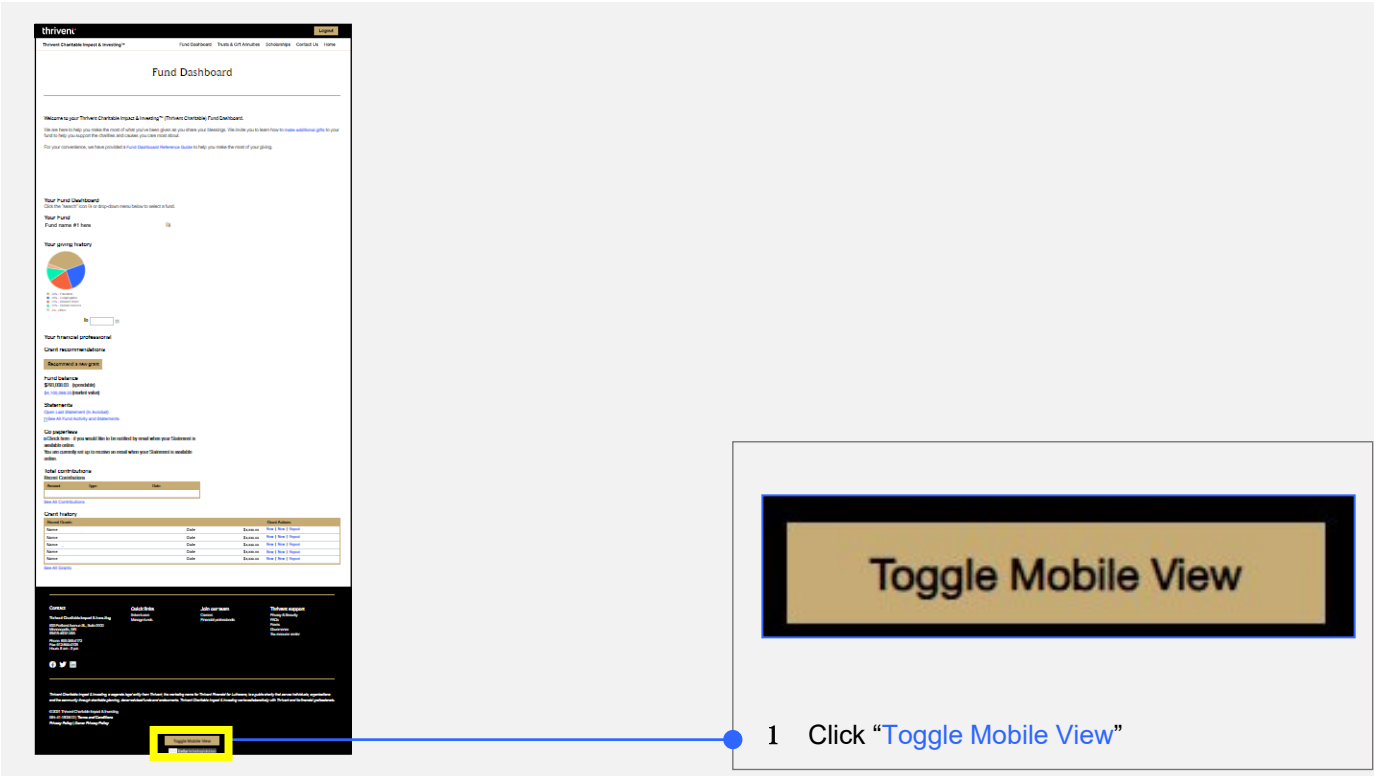
Your Fund Dashboard has several subpages with detailed information. These pages can be accessed by:

- 1 Clicking on the “Fund Dashboard” option in the top navigation bar.
- 2 Navigating to one of the subpages (i.e., “Contributions to Fund” page, as pictured below) from the dropdown menu.



Mobile-Friendly

- 1 To switch to a mobile-friendly version of the website, navigate to the bottom of your browser and click “[Toggle Mobile View](#)”. Click the same button to toggle back to the full site layout from the mobile-friendly view.



Fund Dashboard

You can utilize your Fund Dashboard to view your:

- 1 Giving History
- 2 Financial Professional
- 3 Fund Balance information
- 4 Recent and Historical Statements
- 5 Contributions to Your Funds
- 6 Recent, Requested, and Pending Grants

The screenshot shows the Thrivent Fund Dashboard interface. It includes a navigation bar with links like 'Fund Dashboard', 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. The main content area is titled 'Fund Dashboard' and contains several sections: 'Your giving history' (a pie chart), 'Your financial professional' (a text field), 'Grant recommendations' (a button), 'Fund balance' (a text field), 'Statements' (a link), 'Do paperwork' (a link), 'Total contributions' (a table), and 'Grant history' (a table). Numbered callouts 1 through 6 point to these sections respectively.

Month	Year	Date
2023	2023	2023-01-01
2023	2023	2023-01-01
2023	2023	2023-01-01
2023	2023	2023-01-01
2023	2023	2023-01-01
2023	2023	2023-01-01

Grant Name	Date	Grant Balance
Grant Name	Date	\$1,000.00
Grant Name	Date	\$1,000.00
Grant Name	Date	\$1,000.00
Grant Name	Date	\$1,000.00
Grant Name	Date	\$1,000.00
Grant Name	Date	\$1,000.00

- 1 Giving History
- 2 Financial Professional
- 3 Fund Balance Information
- 4 Recent and Historical Statements
- 5 Contributions to Your Fund
- 6 Recent, Requested, and Pending Grants

Fund Activity

- 1 Navigate to the “Fund Activity” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “Fund Activity” option from the dropdown menu.
- 2 If you have more than one fund, you can switch between them under the “Fund” Section.
- 3 In the Summary Date Range section, you can change the time “Range” that your fund activity is shown, including the last 30, 60, 90 days, 6 months, last year, or a custom date range, by clicking on an option from the dropdown menu.
- 4 The “Fund Activity Summary” section contains a summary of the fund activity for the time period selected (30, 60, 90 days, etc.).
- 5 Under the Fund Activity Summary section, if you click on the topics in blue text: “Total Period Distributions” & “Ending Balance”, more detail will load. **Please see next page for reference*

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Fund

Fund name #1 here

Fund name #2 here

Summary date range

Select a time period from the dropdown, or a date range from 1/31/2014 to today. Search results will appear in the chart below.

Range

Submit

Fund activity summary

Section	Amount
Beginning Balance:	\$0,000.00
Total Period Contributions:	\$0,000.00
Total Period Distributions:	\$0,000.00
Earnings Allocated to Account:	\$0,000.00
Administrative Fee:	\$0,000.00
Other Activity:	\$0,000.00
Change in Value of Investments:	\$0,000.00
Ending Balance:	\$0,000.00

1 Click “Fund Activity”

2 Select “Fund”

3 Select “Range”

4 “Fund Activity Summary”

5 Click “Total Period Distributions”

5 Click “Ending Balance”

Last 30 Days

Last 30 Days

Last 60 Days

Last 90 Days

Last 6 Months

Year To Date

Before

Custom Date Range

Fund Activity (Continued)

- 5 After clicking on “[Total Period Distributions](#)” or “[Ending Balance](#)”, more detail will load. **Per the note on the previous page*
- 6 Below is an example of what you will see after clicking on “[Ending Balance](#)”. This is a summary of the ending balance of your selected fund within the specified time range.
- 7 Below is an example of what you will see after clicking on “[Total Period Distributions](#)”. This is a summary of the total period distributions of your selected fund with the specified time range.
- 8 **Please note:** You may switch between funds by clicking the “[Fund](#)” you wish to view details from towards the top of the page. **See previous page for reference*

Fund activity summary

Section	Amount
Beginning Balance:	\$x,xxx.xx
Total Period Contributions:	\$x,xxx.xx
Earnings Allocated to Account:	\$x,xxx.xx
Administrative Fee:	\$x,xxx.xx
Other Activity:	\$x,xxx.xx
Change in Value of Investments:	\$x,xxx.xx
Ending Balance:	\$x,xxx.xx

Fund holdings

Ending Balance: Report as of 11/1/2021

Description	Qty	Price	Amount
Description	Quantity	\$x,xxx.xx	\$xxx,xxx.xx
Total			\$xxx,xxx.xx

Note: Life Insurance contracts listed above reflect the cash surrender value of the policy; not the death benefit value.

[Export to Pdf](#)
[Export to Excel](#)

My contribution statements

Total Period Contributions: Report from 1/1/2021 to 11/1/2021

Description	Type	Qty	Date	Trans ID	Amount
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Party	Description	Type	Qty	Date	Trans ID
Total					\$75,476.99

Page: 1 of 2 Item 1 to 10 of 15

Note: Life Insurance contracts listed above reflect the cash surrender value of the policy; not the death benefit value.

5 Click “Total Period Distributions”

5 Click “Ending Balance”

6 “Ending Balance” details

7 “Total Period Distributions” details

Fund

Fund name #1 here

Fund name #2 here

8 Select “Fund”

Investment Allocation

- 1 Navigate to the “[Investment Allocation](#)” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “[Investment Allocation](#)” option from the dropdown menu.
- 2 On the investment allocations page, you can learn more about your investment options and “[Change Your Investment Allocation](#)”. If you click on “[Change Your Investment Allocation](#)”, you will be redirected to our Investment Allocation Change Request [form](#).

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Investment Allocations

As a donor/fund advisor you have the flexibility to recommend how you allocate your fund. On your fund type, you can invest all or a portion of your fund's allocation to the [income portfolio](#) to reduce or eliminate your fund's investment in equities. To determine the right investment mix for your giving, consider your grantmaking goals:

- What are your short-term or long-term grantmaking goals? Do you want to grant for 10 to 20 years or more, or pass advisement to future generations? Do you grant larger amounts within the next 2 to 10 years?
- How would short-term fluctuations in investment values affect your grantmaking plans?
- Do you want all or a portion of your fund invested for financial and mission/social return?

[Learn more about investment portfolios](#)

[Change your investment allocation](#)

Allocations are typically adjusted within 2 weeks of your request. Note: Non-advised fund donors cannot recommend changes to a fund's investment allocation.

1 Click “Investment Allocation”

2 Click “Change Your Investment Allocation”

Contribution Activity

- 1 Navigate to the Contribution Activity page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “Contributions to Fund” option from the dropdown menu.
The Contribution Activity page provides the history of your contributions to your charitable fund.
- 2 To change the time range that the search pulls from, pick an option from the “Duration” 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 To view a letter with confirmation and receipt of your contribution, click “View Letter”.
- 5 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.

The screenshot shows the Thrivent website's Contribution Activity page. The top navigation bar includes 'Fund Dashboard', 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. A dropdown menu is open under 'Fund Dashboard', showing options like 'Fund Activity', 'Investment Allocation', 'Contributions to Fund' (highlighted), 'Recommend Grants', 'Grant History', 'Fund Relationships', 'My Documents', and 'My Profile'. Below the navigation, the page title 'Contribution Activity' is displayed. A search section includes a 'Duration' dropdown (set to 'Last 30 Days'), an 'Advanced Search' button, and a 'Submit' button. A table of contribution details is shown with columns: Trans ID, Date, Party, Description, Status, Amount, Type, and Gift Letter. A 'View Letter' link is present in the 'Gift Letter' column. At the bottom, there are links for 'Export to Pdf' and 'Export to Excel'. A callout box on the right shows the expanded 'Advanced Search' form with fields for 'Duration', 'Find', 'Exact Match', and 'Status'.

1 Click “Contributions to Fund”

2 Click “Duration” drop down

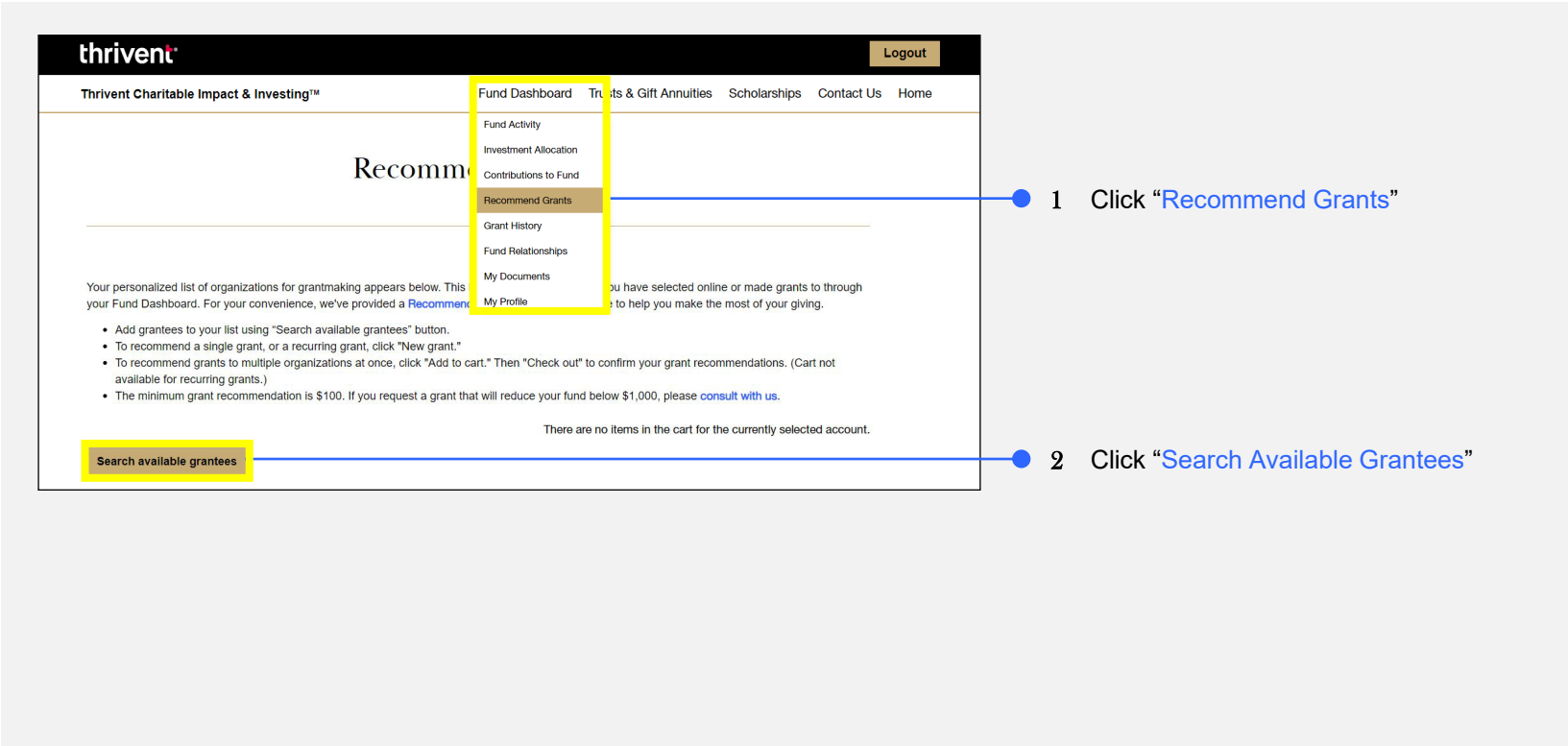
3 “Advanced Search”

4 Click “View Letter”

5 Click “Export to Excel”

Recommend Grants

- 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.
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*



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. **Please 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:

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"

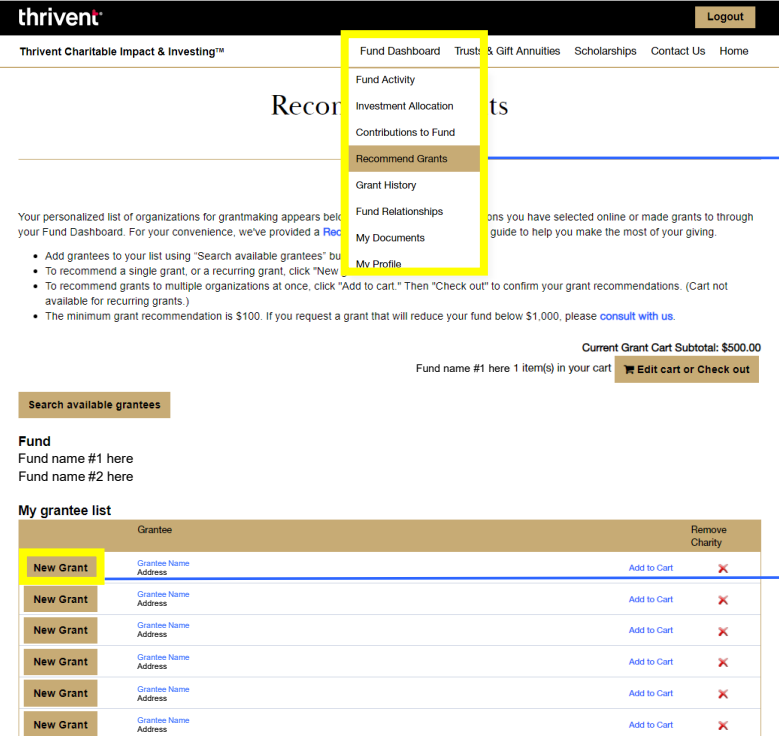
4 Click "Organization Name"

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

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*



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Your personalized list of organizations for grantmaking appears below your Fund Dashboard. For your convenience, we've provided a [Recommend Grants](#) guide to help you make the most of your giving.

- Add grantees to your list using "Search available grantees" button.
- To recommend a single grant, or a recurring grant, click "New Grant" button.
- 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](#).

Current Grant Cart Subtotal: \$500.00

Fund name #1 here 1 item(s) in your cart [Edit cart or Check out](#)

[Search available grantees](#)

Fund

Fund name #1 here

Fund name #2 here

My grantee list

	Grantee	Remove Charity
New Grant	Grantee Name Address	Add to Cart
New Grant	Grantee Name Address	Add to Cart
New Grant	Grantee Name Address	Add to Cart
New Grant	Grantee Name Address	Add to Cart
New Grant	Grantee Name Address	Add to Cart
New Grant	Grantee Name Address	Add to Cart

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 recure, 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 'Grant Entry' section includes a form with the following fields and callouts:

- Callout 3:** Points to the radio buttons for 'As a Single Payment' and 'As a Recurring Payment'.
- Callout 4:** Points to the 'Amount' input field under 'Recommended Grant Amount'.
- Callout 5:** Points to the 'Frequency' dropdown menu under 'Recurring Payments'.
- Callout 6:** Points to the '# of Payments' input field under 'Recurring Payments'.
- Callout 7:** Points to the 'Start' date input field under 'Recurring Payments'.

The form also displays a balance of \$293,008.03 and a total amount of \$0.00.

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 showing the frequency options: Annually, Bi-monthly, Monthly, Quarterly, and Semi-annually. The 'Annually' option is currently selected.

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” 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 – 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 Thrivent website interface for recommending grants. A yellow box highlights the 'Recommend Grants' option in the top navigation bar dropdown menu, with a blue line pointing to callout 1. Below, the 'My grantee list' table is shown with several rows. The first row has a yellow box around the 'New Grant' button, with a blue line pointing to callout 2. The second row has a yellow box around the 'Add to Cart' button, with a blue line pointing to callout 3. The third row has a yellow box around the 'X' button, with a blue line pointing to callout 4. The table columns are 'Grantee', 'Remove', and 'Charity'.

1 Click “Recommend Grants”

2 Click “New Grant”

3 Click “Add to Cart”

4 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:** A dropdown menu for "Name" and a text input for "Amount" (highlighted with a yellow box and callout 5).
- Purpose:** A large text area for "Purpose" (highlighted with a yellow box and callout 6).
- Grant acknowledgement and anonymity preferences:** A section with a checkbox "Please make this Grant Recommendation Anonymous".
- 3) (Optional):** A dropdown menu for "You may select additional options from the drop-down box below (e.g., for the missionary work of, in honor of, in memory of)".
- 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):** A text input field.
- Special Note:** A text input field (highlighted 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".

Callouts 8, 9, and 10 point to these buttons:

- 8 Click "Close"
- 9 Click "Save Changes"
- 10 Click "Save Changes & Go to 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](#)”.

- 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. **Please see below for reference*

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

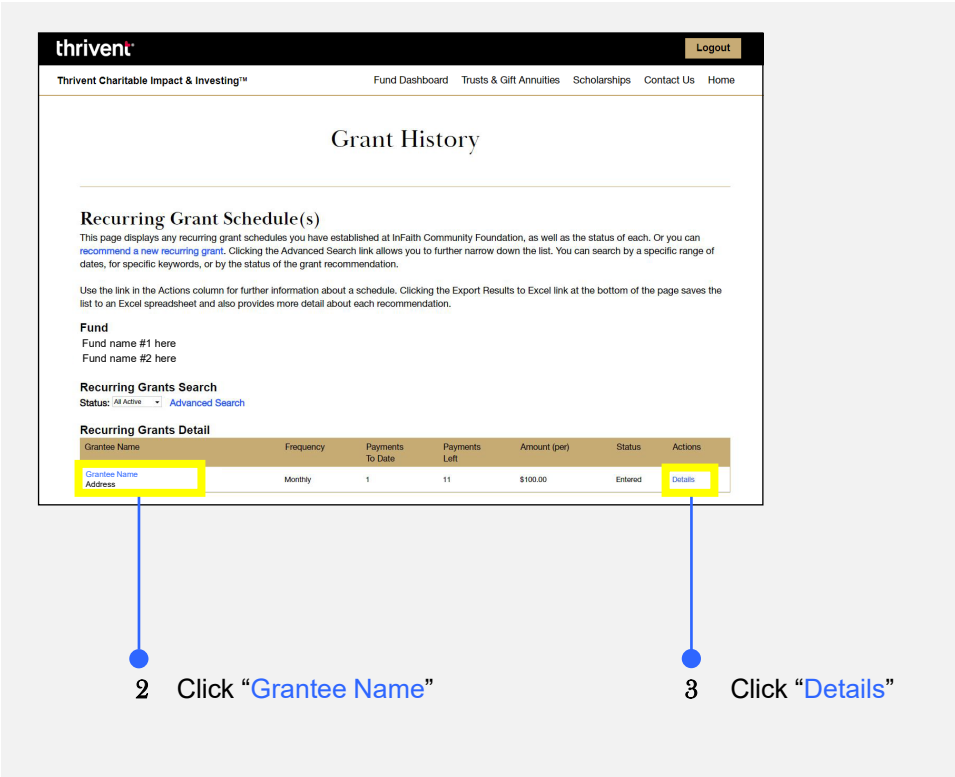
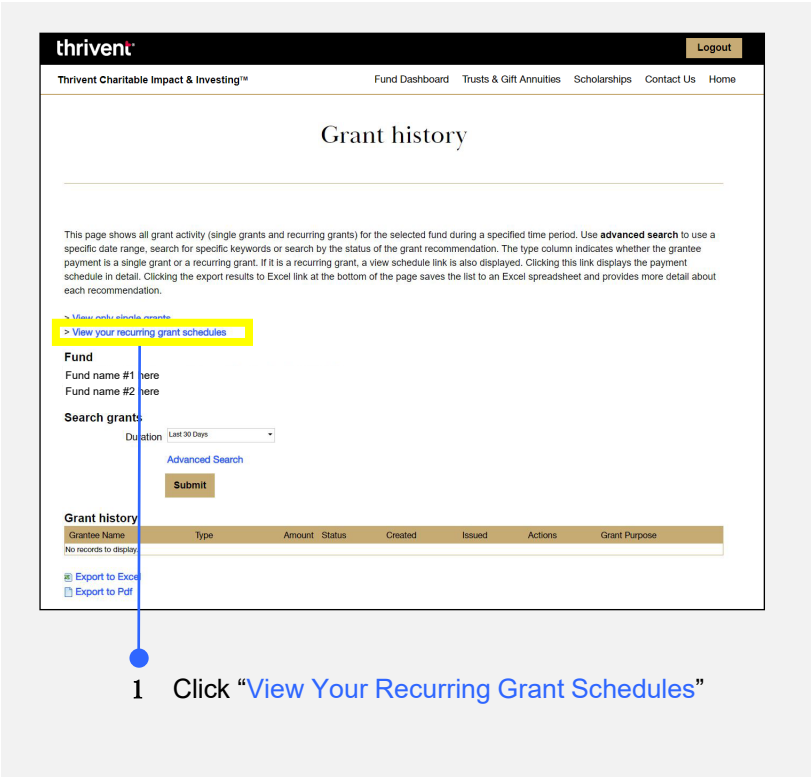
5 Click “Confirm and Submit”

6 Click “Cancel”

Recommend Grants – Edit an Existing Recurring Grant

To edit an existing recurring grant, please start by navigating to 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.



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.

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Grantee Name

Address

Schedule

From 10/21/2021 to 9/21/2022 Monthly for \$100.00

Purpose

Purpose

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	View
ID#	Posted	\$1,833.48	9/6/2020	9/20/2020	9/15/2020	9/23/2020	View

1 Click “Back”, “Edit”, or “Cancel”

2 Click “Back”, “Edit”, or “Cancel”

3 Click “Cancel & Recreate”

4 Click “View”

Fund Relationships

- 1 Navigate to the “Fund Relationships” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “Fund Relationships” option from the dropdown menu.
The Fund Relationships page 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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Fund Relationships

Below is a list of all users that are related to your fund(s). Use the dropdown menu to select the fund(s) you want to view. 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 additional information, please [contact us](#).

Fund

Fund name #1 here

Fund name #2 here

Name	Role	Access
VanSprell, Brad	Adviser-requested access	Full Access
Sauer, Rebecca	Adviser-requested access	Full Access
VanSprell, 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
Paulson, Katie	Adviser-requested access	Full Access

1 Click “Fund Relationships”

2 Click “Here”

3 “Details”

My Documents

- 1 Navigate to the “My Documents” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “My Documents” option from the dropdown menu.

On the My Documents page, you will find documentation related to your fund:

- 2 Copies of Checks & Original Fund Agreement document
- 3 Fund Dashboard Instructions
- 4 Fund Maintenance forms

Note: Monthly and quarterly statements can be found on your Fund Dashboard.

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My Documents

Fund name #1 here

Fund name #2 here

My fund documents

File Name

FileName#1.pdf

FileName#2.pdf

General documents

Title	Size	
Fund Dashboard reference guide for charitable funds	Unknown	Download
Fund Dashboard reference guide for trusts & gift annuities	Unknown	Download
Fund Dashboard log in instructions for charitable funds	Unknown	Download
Fund Dashboard log in instructions for trusts & gift annuities	Unknown	Download

For individuals

Title	Size	
Add/remove online access form	303.52 KB	Download
Charity change form	317.15 KB	Download

For organizations

Title	Size	
Add/remove online access form	303.52 KB	Download

1 Click “My Documents”

2 Copies of checks & Fund Agreement

3 Fund Dashboard Instructions

4 Fund Maintenance Forms

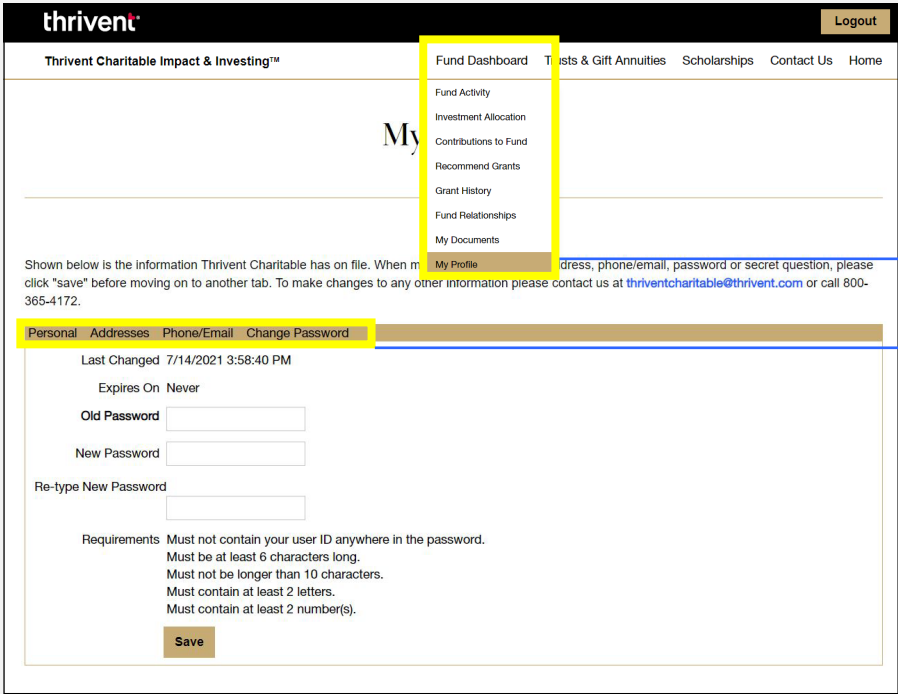
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Questions? Please don't hesitate to contact our team for additional assistance at thriventcharitable@thrivent.com or call 800-365-4172.

My Profile

- 1. Navigate to the “My Profile” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “My Profile” option from the dropdown menu.
- The profile 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 2 pages*



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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.

Personal | **Addresses** | Phone/Email | Change Password

Last Changed 7/14/2021 3:58:40 PM

Expires On Never

Old Password

New Password

Re-type New Password

Requirements Must not contain your user ID anywhere in the password.
Must be at least 6 characters long.
Must not be longer than 10 characters.
Must contain at least 2 letters.
Must contain at least 2 number(s).

Save

- 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.

- 3 This is where you will review your addresses and click the “[Make Mailing](#)” address option for the address where you wish to receive any correspondence from Thrivent Charitable.
- 4 To add a new address, click the “[Add](#)” button.
- 5 Once you have made the necessary updates, click the “[Save](#)” button to submit these changes.

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My profile

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PersonaAddressesPhone/EmailChange Password

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

Save

3 Click “[Make Mailing](#)”

4 Click “[Add](#)”

5 Click “[Save](#)”

My Profile (Continued)

Below is an example of navigating to the “Phone/Email” topic from the gold navigation bar. **See page 24 for reference*

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

- 6 This is where you will review your phone number and email information and can edit or remove them by clicking “Edit | Remove”. This is referencing the contact information that Thrivent Charitable will use to reach out to you when needed.
- 7 To add a new phone number or email, click the “Add” button.
- 8 Once you have made the necessary updates, click the “Save” button to submit these changes.

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PersonalAddressesPhone/EmailChange Password

Type	Value	Primary	Actions
Cellular Telephone Number	Phone number here	Yes	Edit Remove
E-mail	Email here	Yes	Edit Remove

Save

- 6 Click “Edit | Remove”
- 7 Click “Add”
- 8 Click “Save”



**Thrivent Charitable
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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.