thrivent®

Thrivent Charitable Impact & Investing®

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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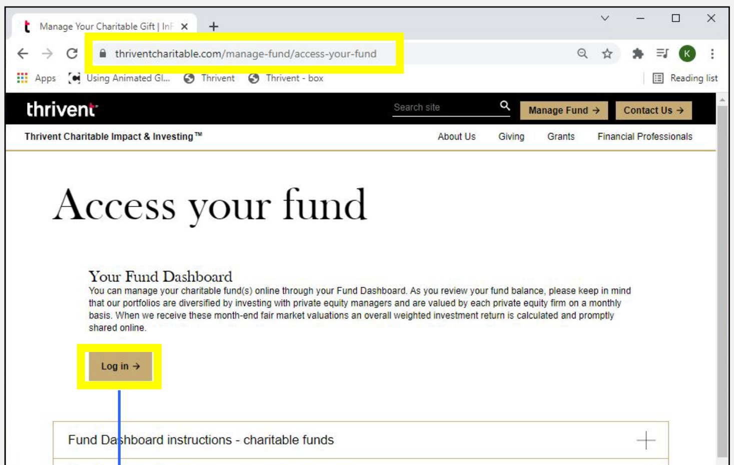
First Time Login Instructions

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.

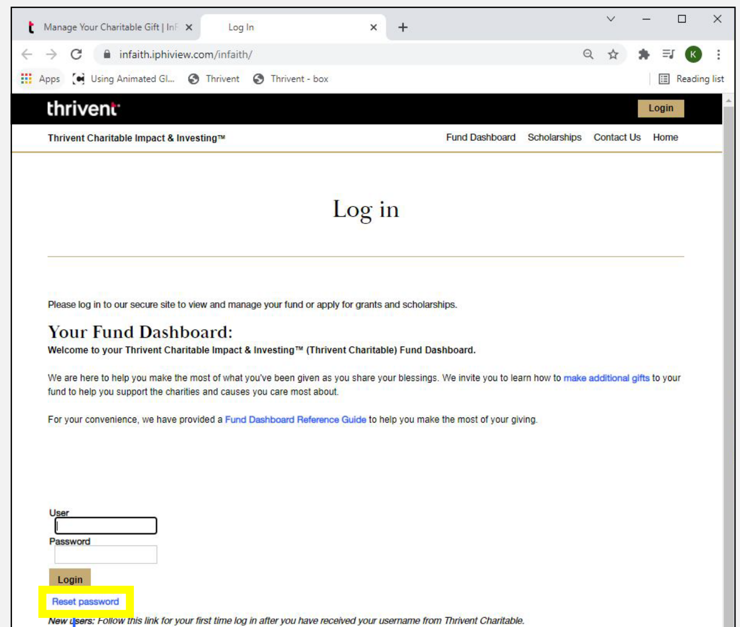
To log in for the first time, go to https://www.thriventcharitable.com/manage-fund/access-your-fund.

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".



1 Click "Log In"



2 Select "Reset Password"

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

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Verifying Your Account

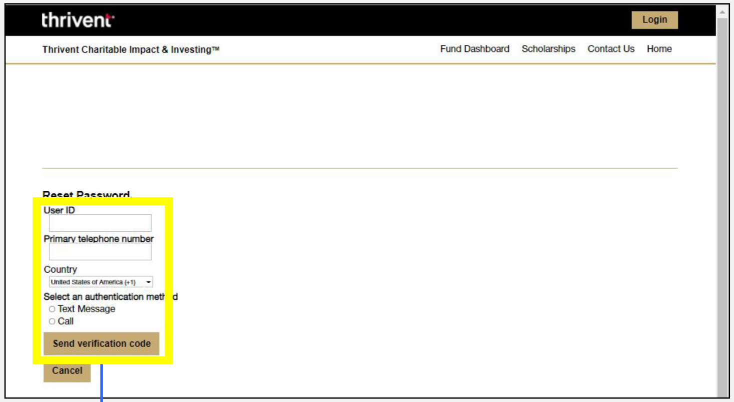
After clicking on reset password, you will be directed to the Reset Password screen.

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.

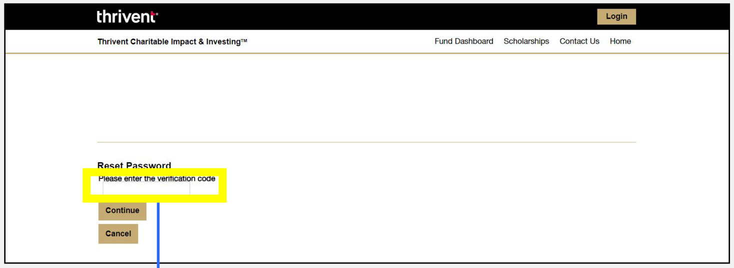
4 Once the Authentication screen loads, enter the “Authentication Code” you received via a phone call or text message.



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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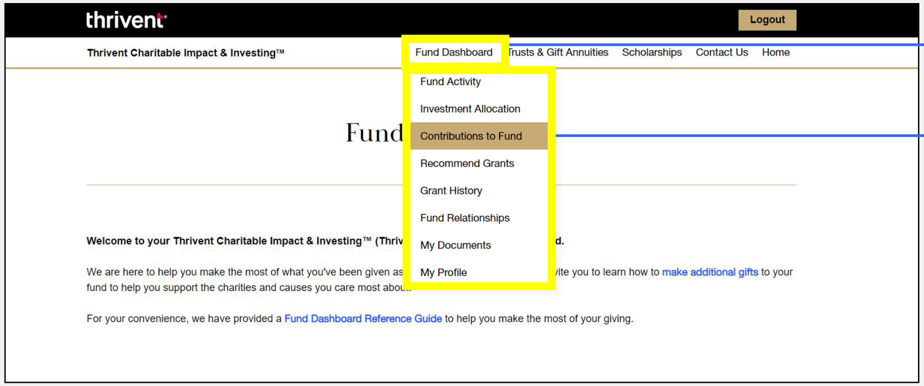
Navigating Your Fund Dashboard

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.



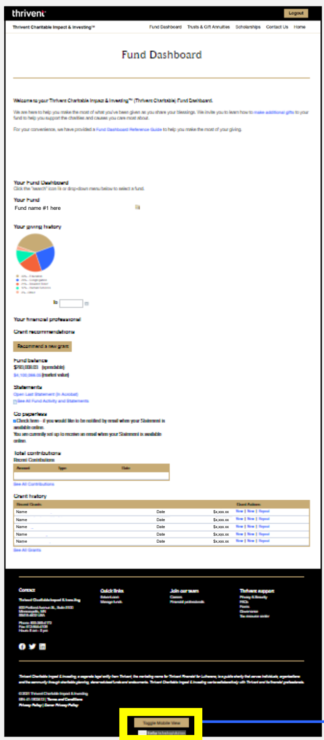
1 Click "Fund Dashboard"

2 Navigate to subpage (i.e., "Contributions to Fund" page, as pictured)

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

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.



1 Click "Toggle Mobile View"

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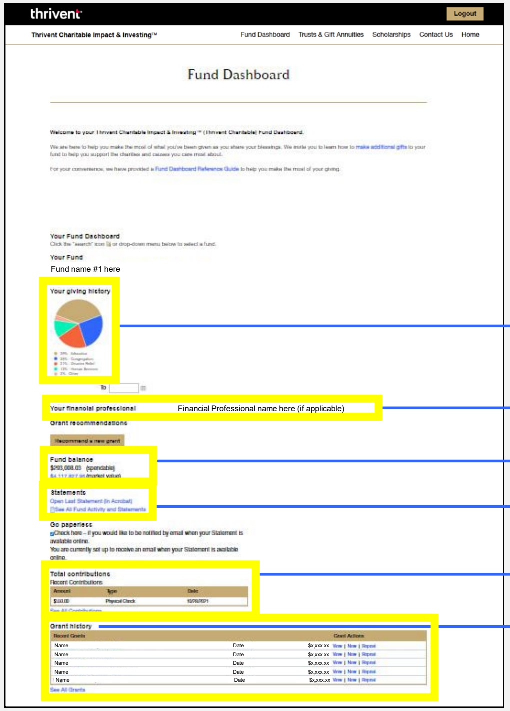
Fund Dashboard

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



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

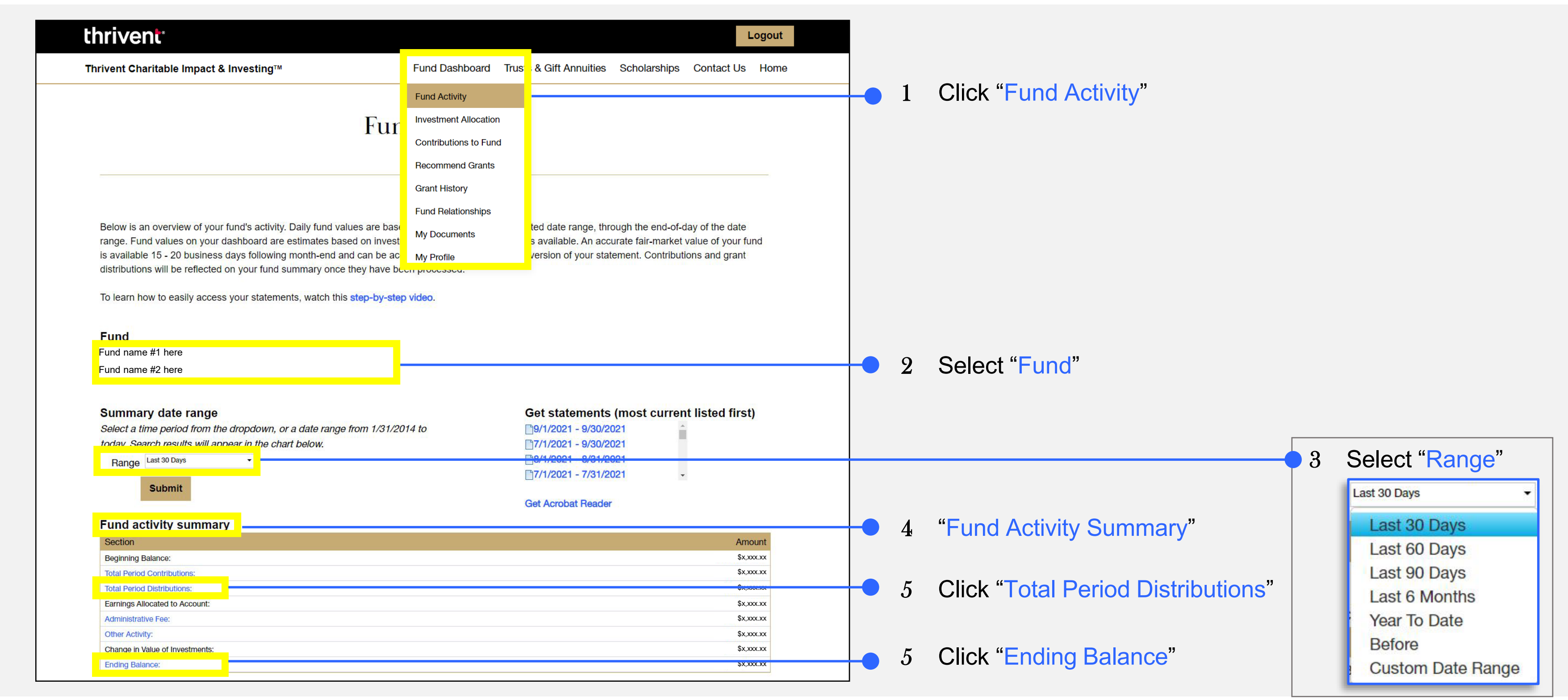
1 Navigate to the "Fund Activity" page by clicking on the Fund Dashboard option in the top navigation bar and selecting the "Fund Activity" option from the dropdown menu.

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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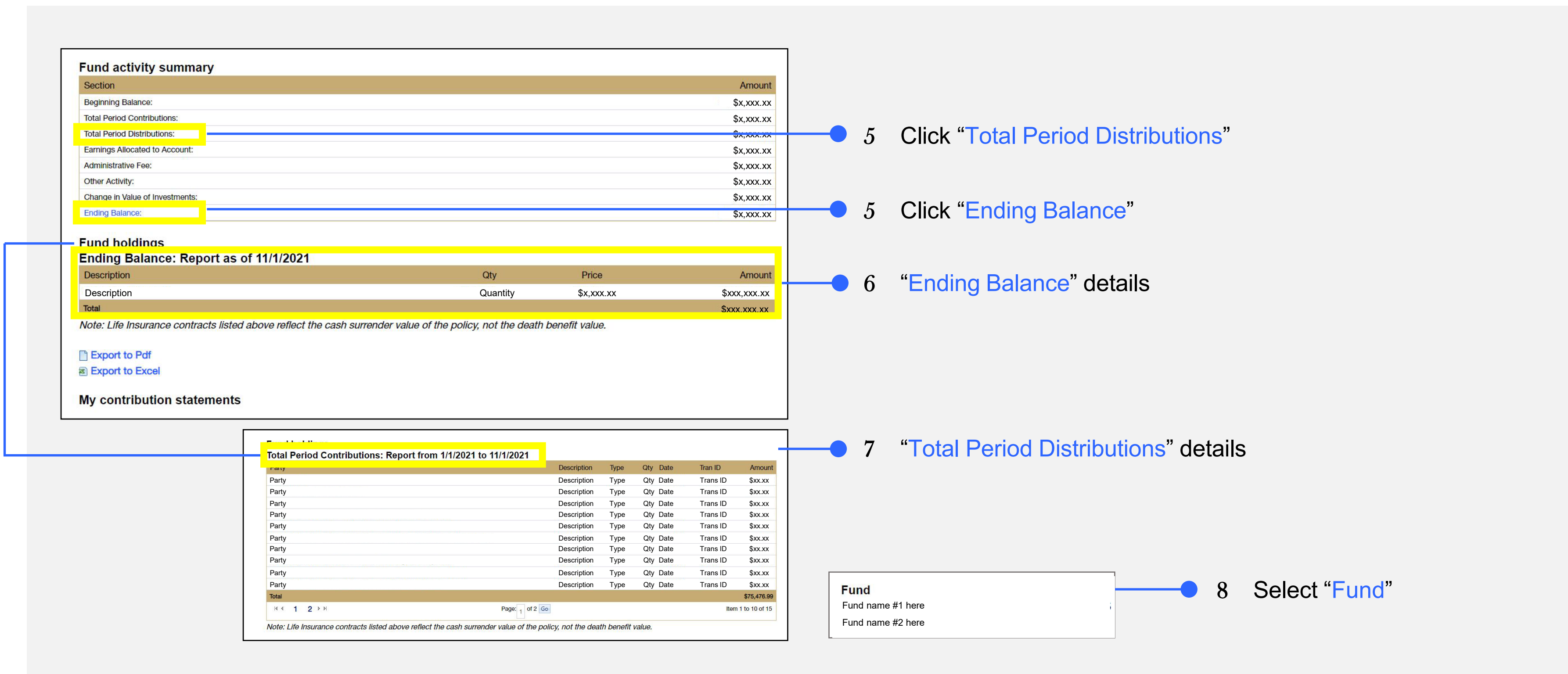
Fund Activity (Continued)

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*



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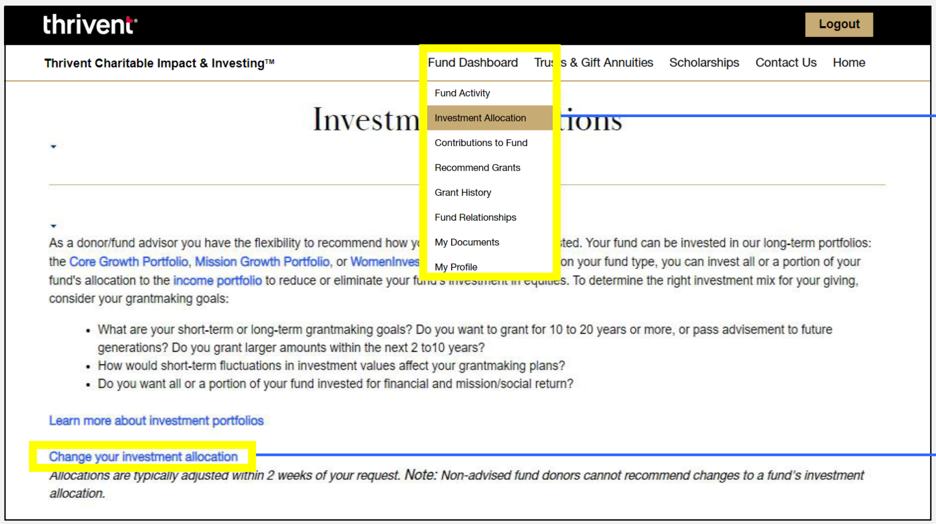
Investment Allocation

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.



1 Click “Investment Allocation”

2 Click “Change Your Investment Allocation”

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

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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.

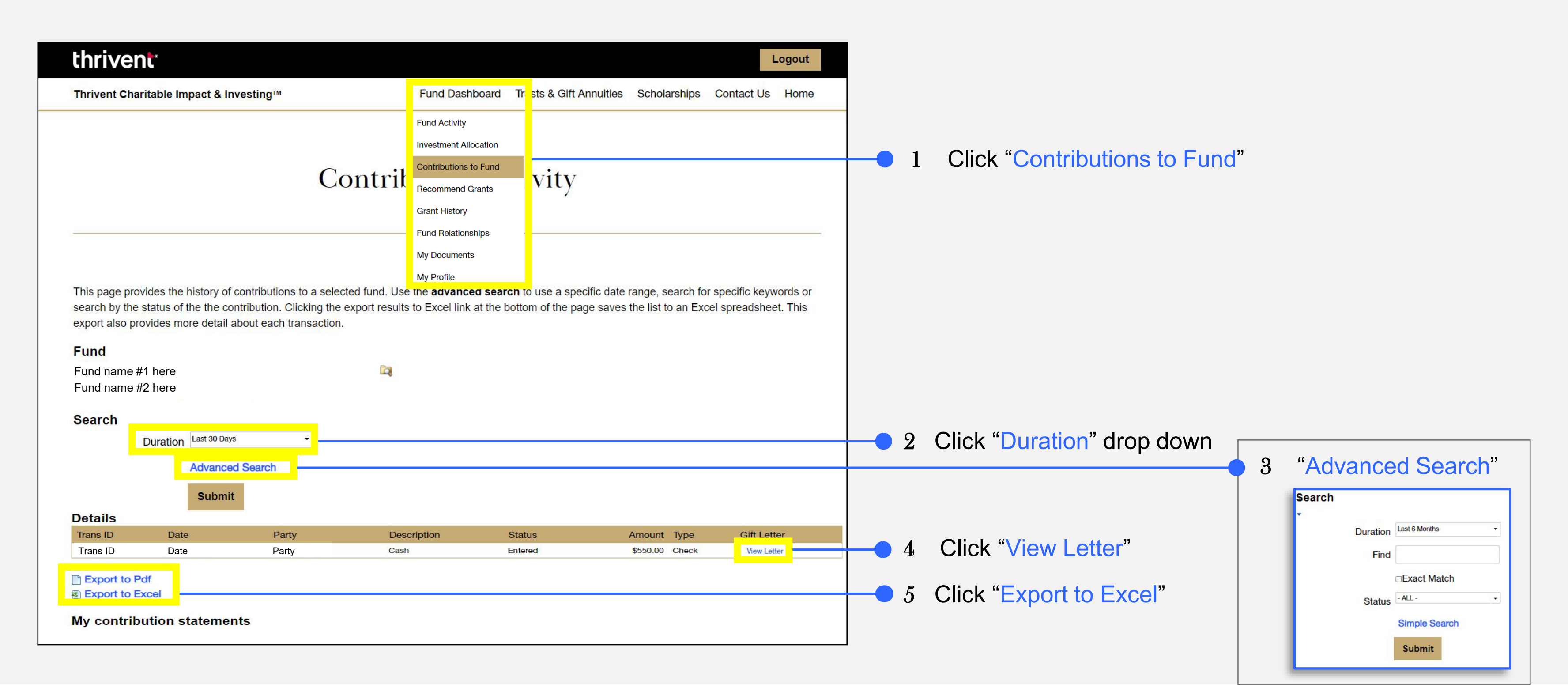
The Contribution Activity page provides the history of your contributions to your charitable fund.

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.



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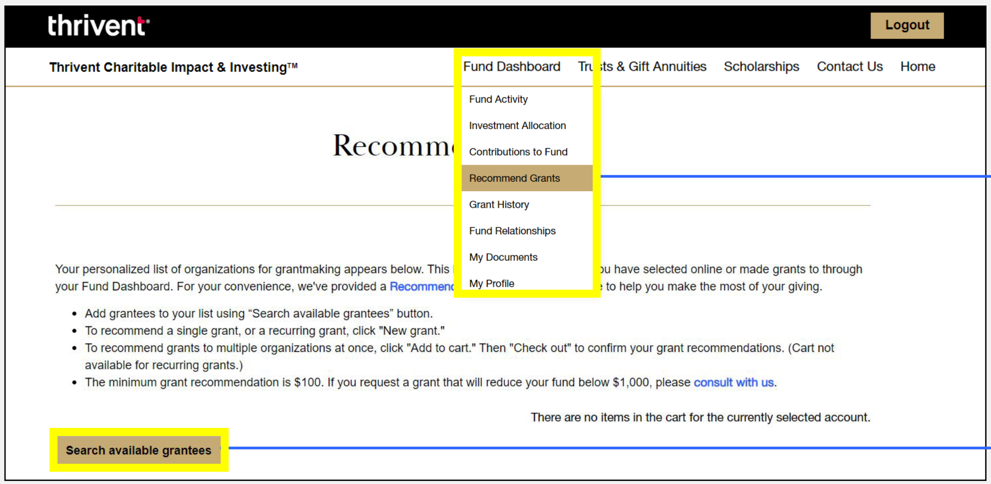
Recommend Grants

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*



1 Click “Recommend Grants”

2 Click “Search Available Grantees”

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

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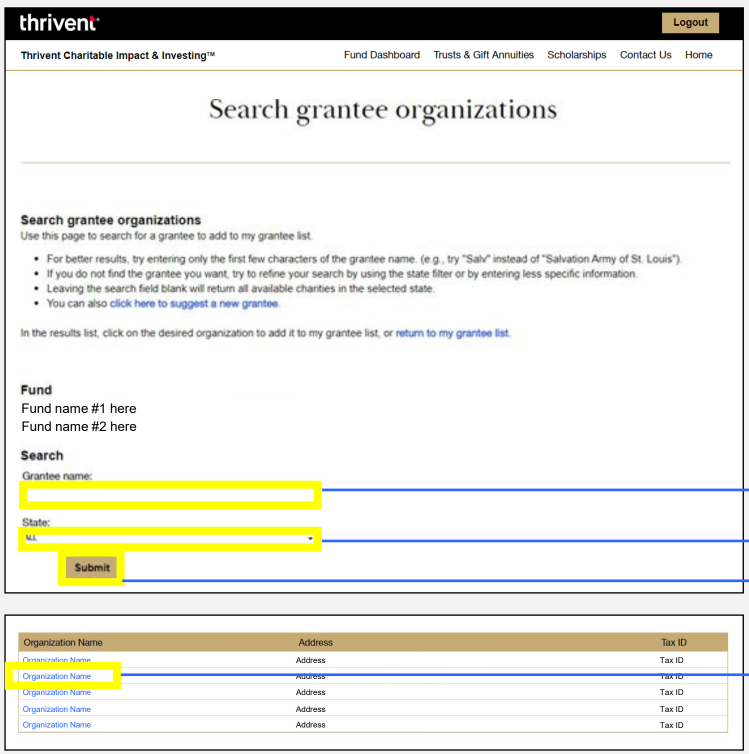
Recommend Grants - Add an Organization to Your Grantee List

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.



1 Enter "Grantee Name"

2 Select "State"

3 Click "Submit"

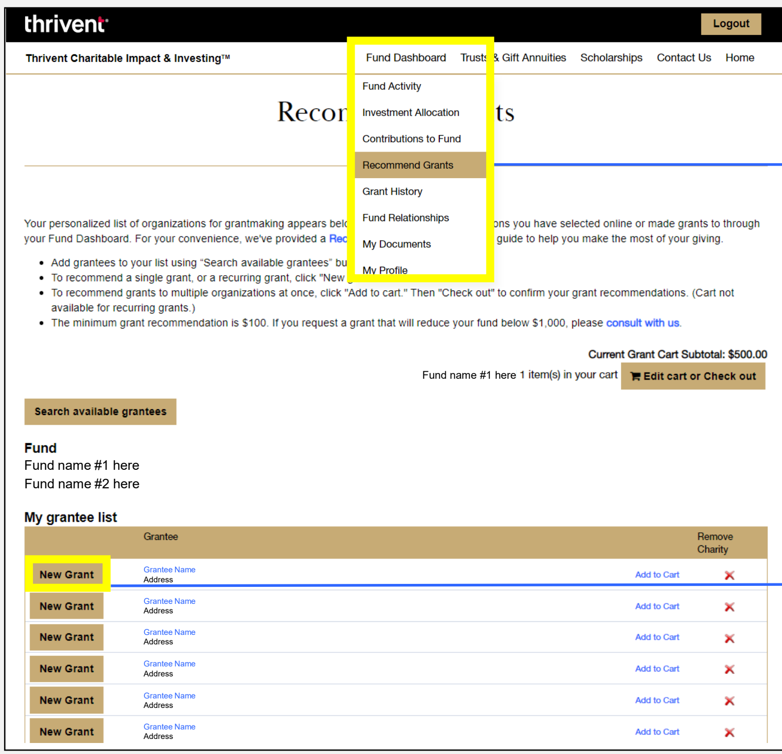
4 Click "Organization Name"

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*



1 Click “Recommend Grants”

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

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

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

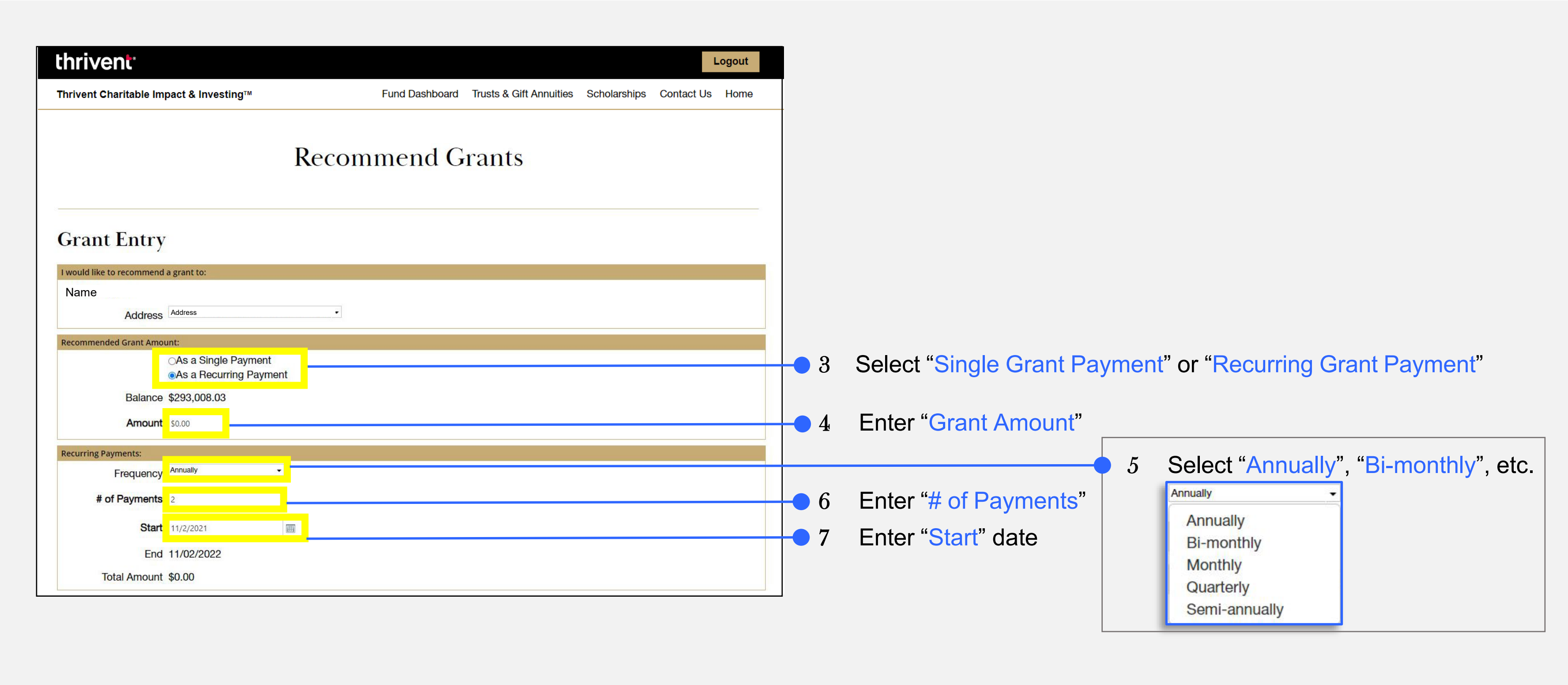
3 Once the Grant Entry screen has loaded (**See previous page for reference on navigating to this page*), select either a "Single Grant Payment" or "Recurring Grant Payment". If you select recurring, you will have an additional section of choices.

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.



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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.

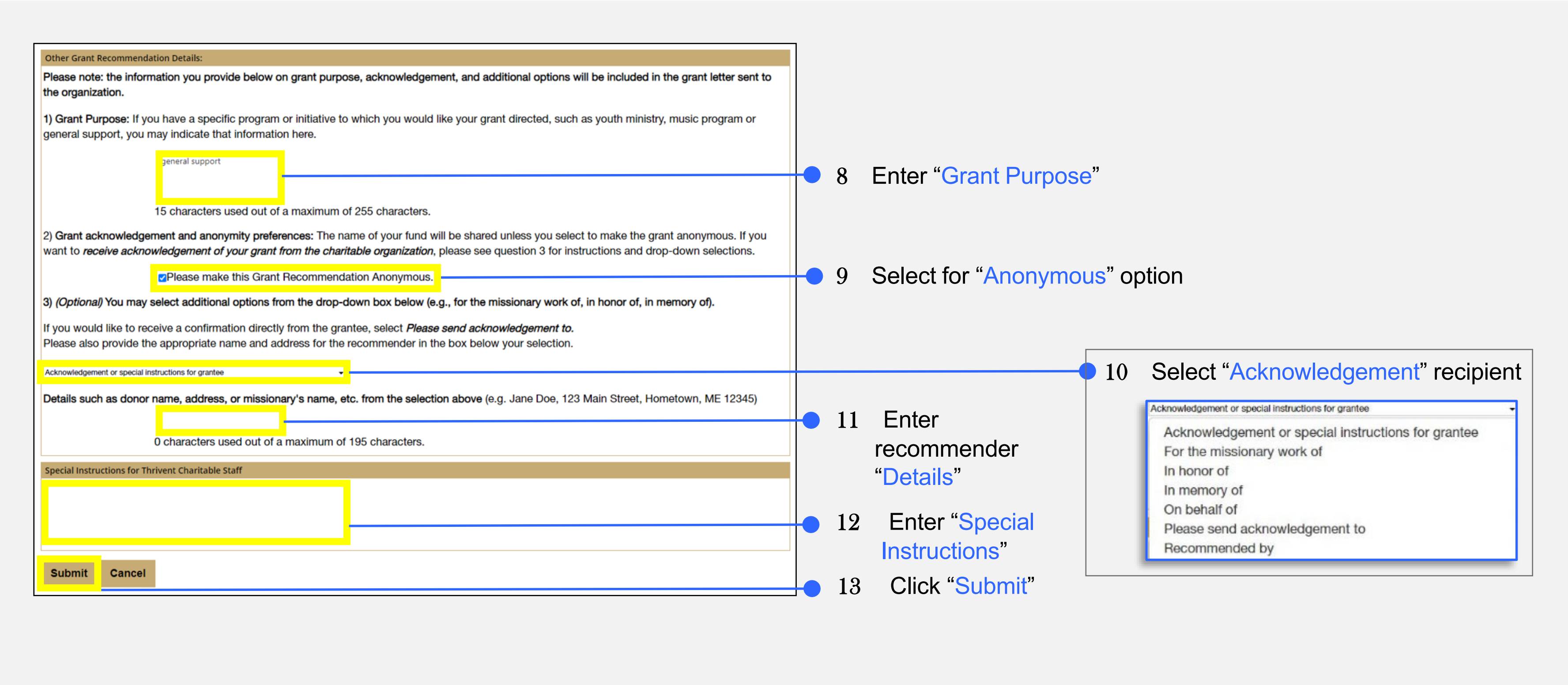
9 If you would prefer the grant recommendation remain anonymous, check the "Please make this Grant Recommendation Anonymous" option.

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.



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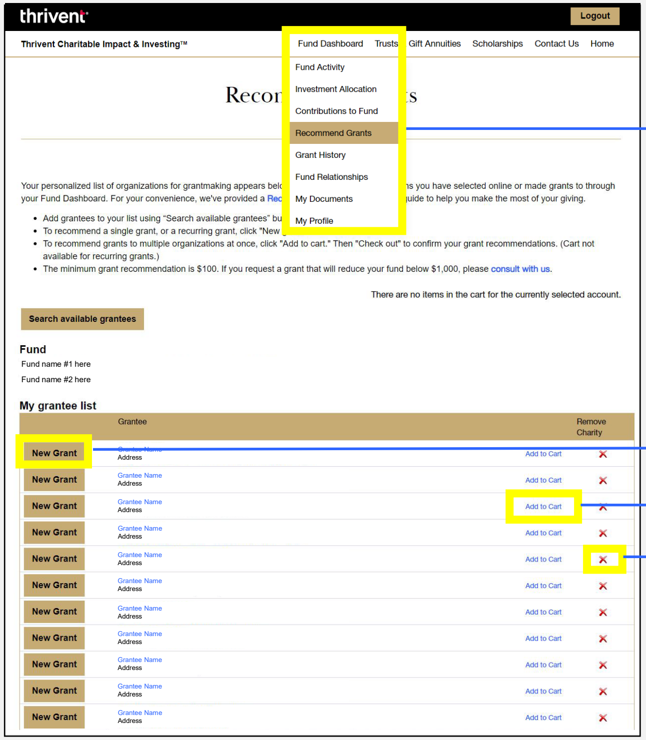
Recommend Grants – Add a Grant to Your Cart

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.



1 Click “Recommend Grants”

2 Click “New Grant”

3 Click “Add to Cart”

4 Click “X”

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

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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".

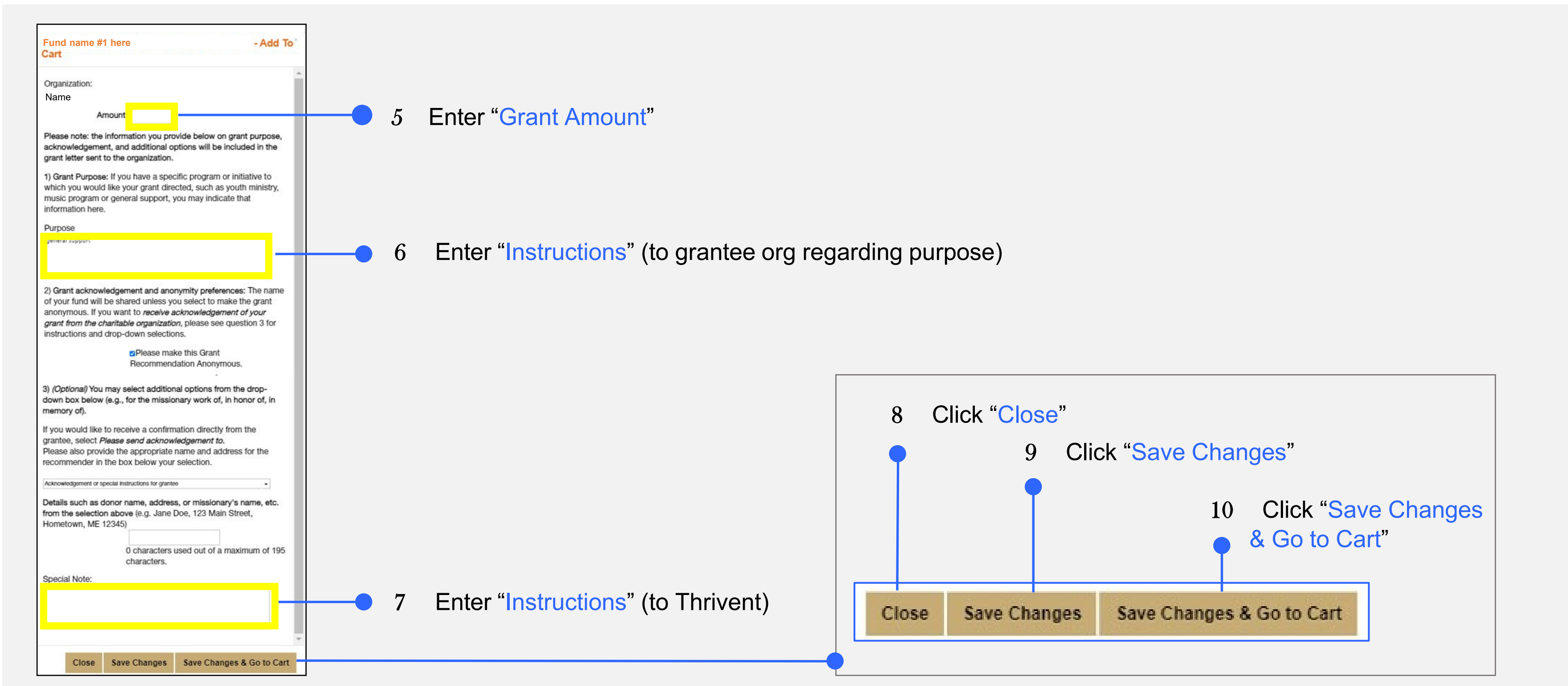
6 Enter "Instructions" to the grantee organization regarding the purpose of the grant.

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*



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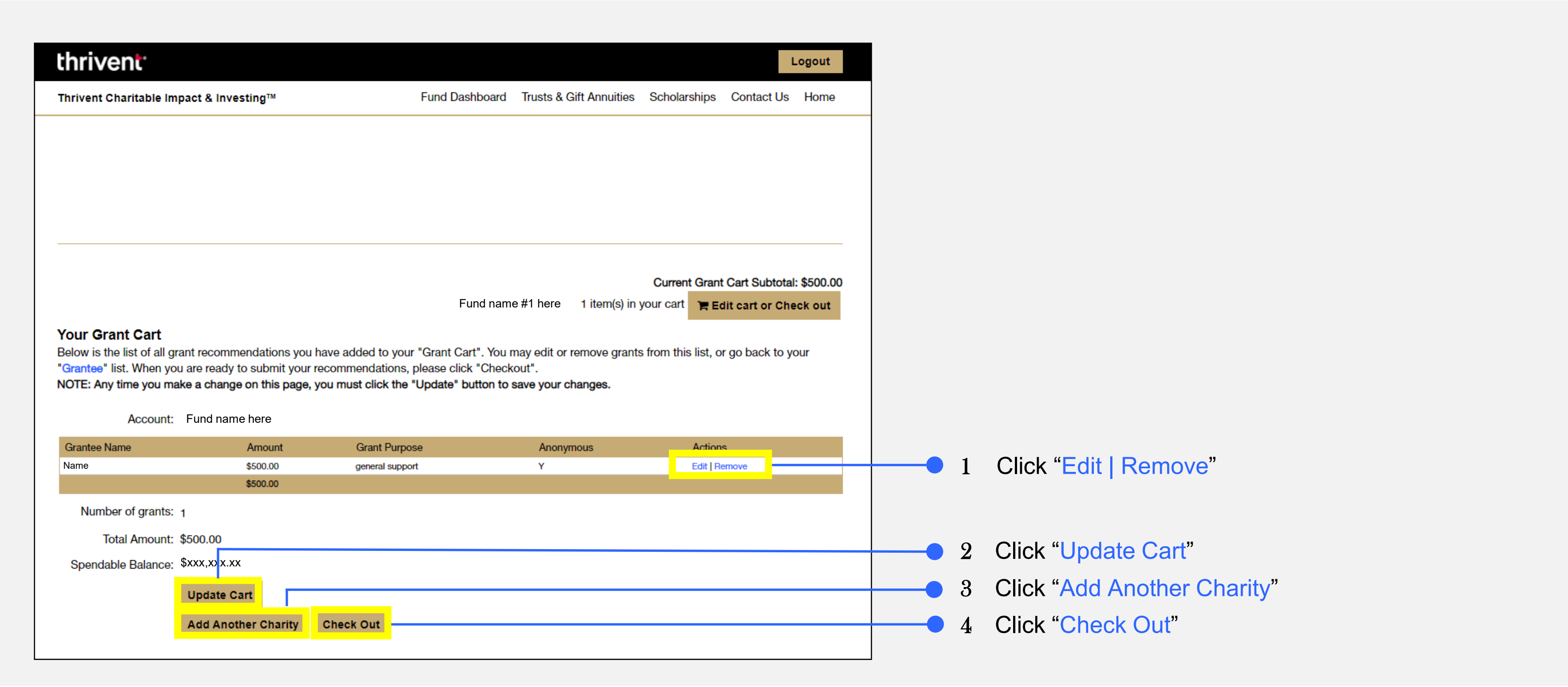
Recommend Grants – Grant Cart Detail

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”.



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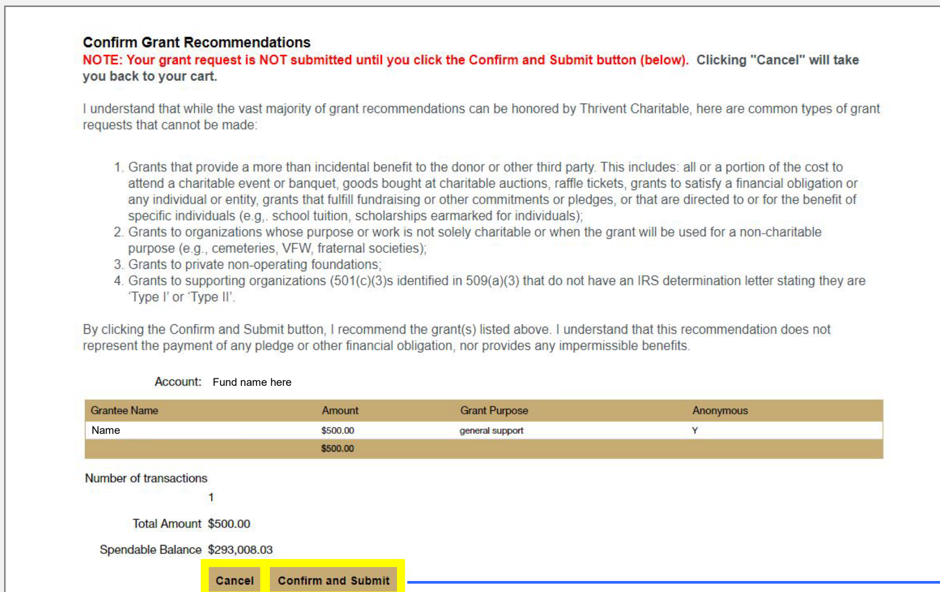
Recommend Grants – Grant Cart Detail (Continued)

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"

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

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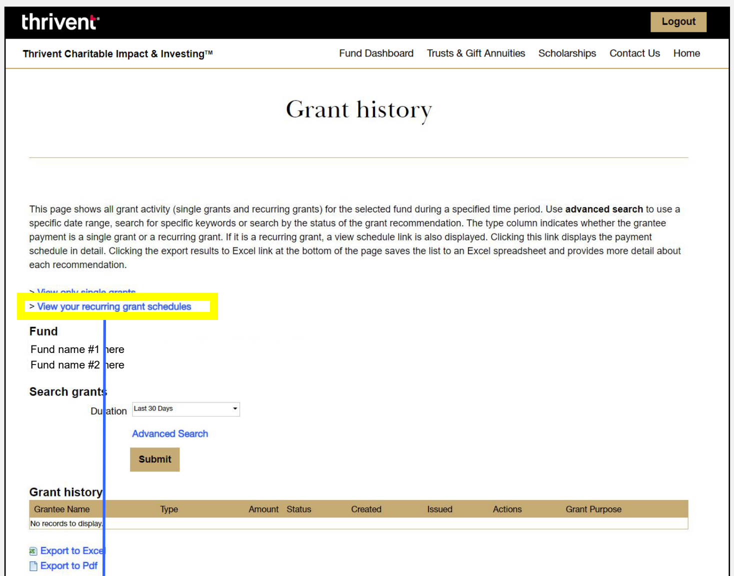
Recommend Grants – Edit an Existing Recurring Grant

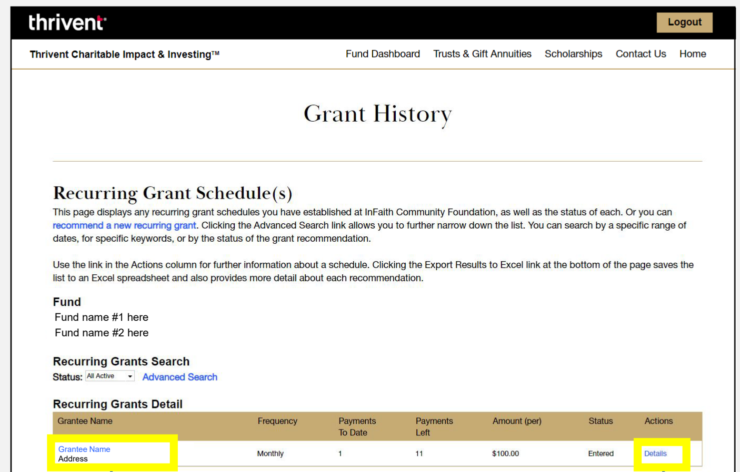
To edit an existing recurring grant, please start by navigating to the grant history page. **Pictured below on the left*

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.





1 Click "View Your Recurring Grant Schedules"

2 Click "Grantee Name"

3 Click "Details"

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

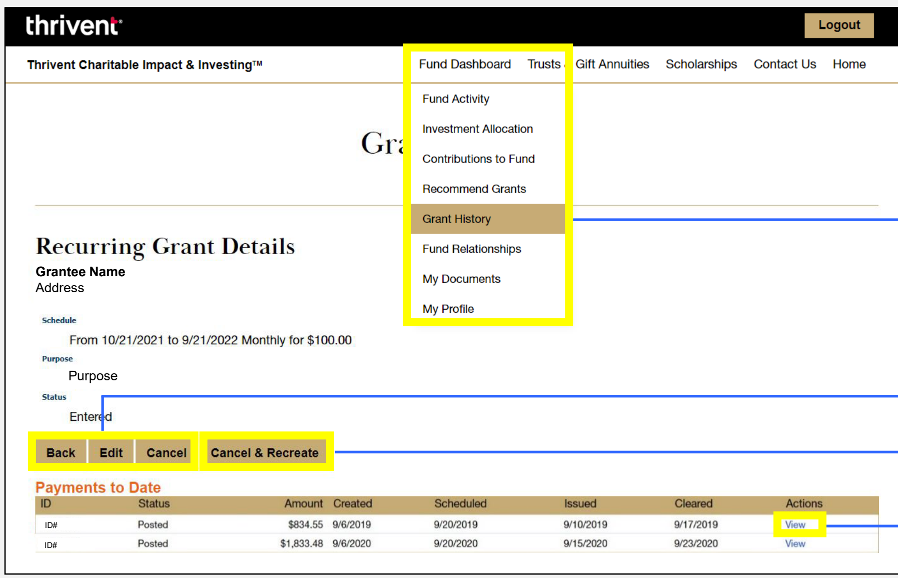
Grant History

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.



1 Click “Back”, “Edit”, or “Cancel”

2 Click “Back”, “Edit”, or “Cancel”

3 Click “Cancel & Recreate”

4 Click “View”

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

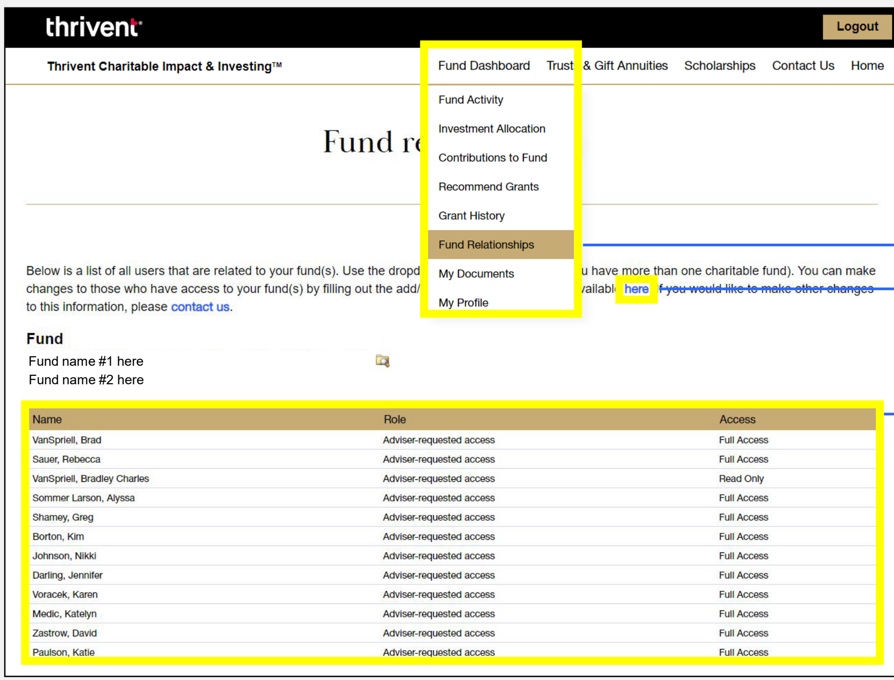
Fund Relationships

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.



1 Click "Fund Relationships"

2 Click "Here"

3 "Details"

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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.

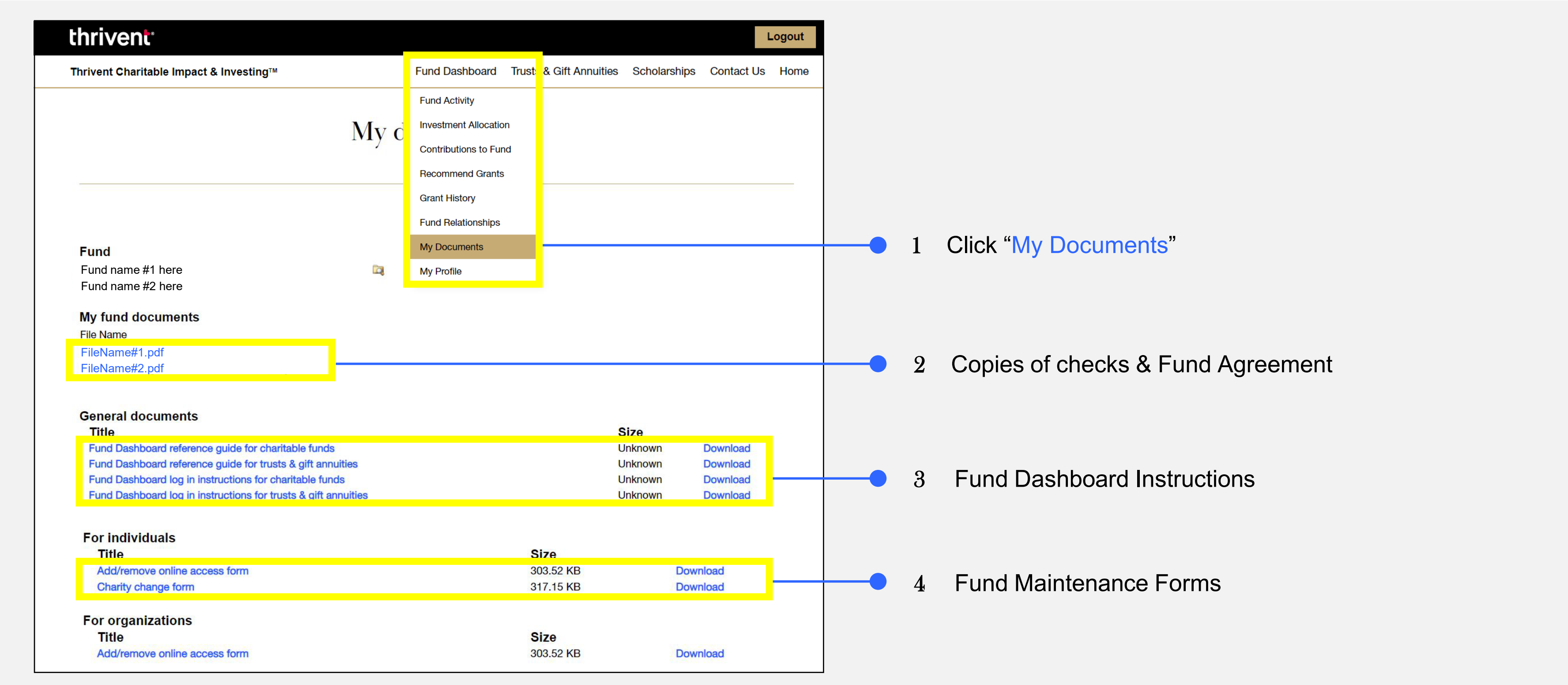
On the My Documents page, you will find documentation related to your fund:

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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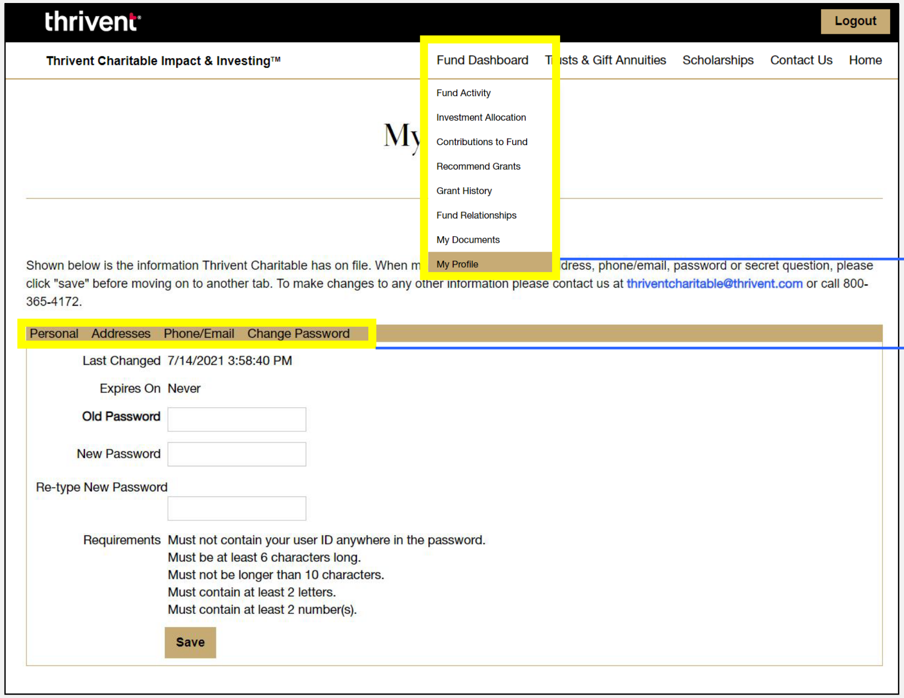
My Profile

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*



1 Click "My Profile"

2 Click "Addresses", "Phone/Email", or "Change Password"

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

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My Profile (Continued)

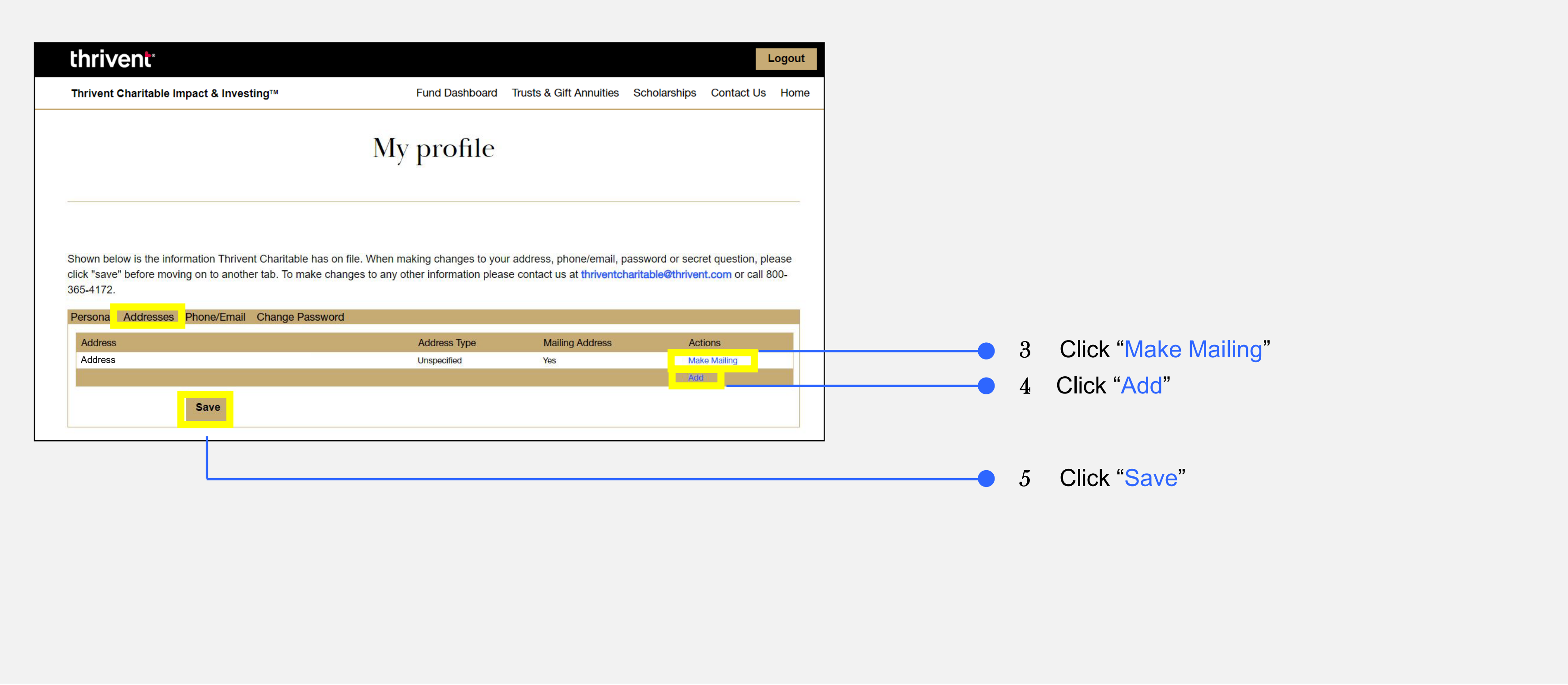
Below is an example of navigating to the Addresses topic from the gold navigation bar. **See previous page for reference*

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

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 (Continued)

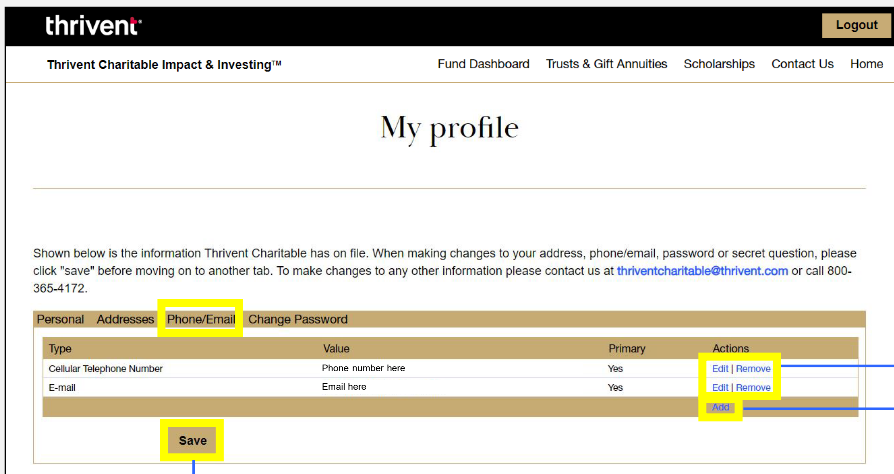
Below is an example of navigating to the “Phone/Email” topic from the gold navigation bar. **See page 24 for reference*

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.



6 Click “Edit | Remove”

7 Click “Add”

8 Click “Save”

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

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