

Fund Dashboard: Charitable fund guide

As we work along side you to help ensure your clients have all the tools needed to experience the joy of making a difference, below are tips for when logging in.

Please see Page 2 for helpful navigation tips.



Donors have flexibility to update investment allocations quickly and at their convenience.

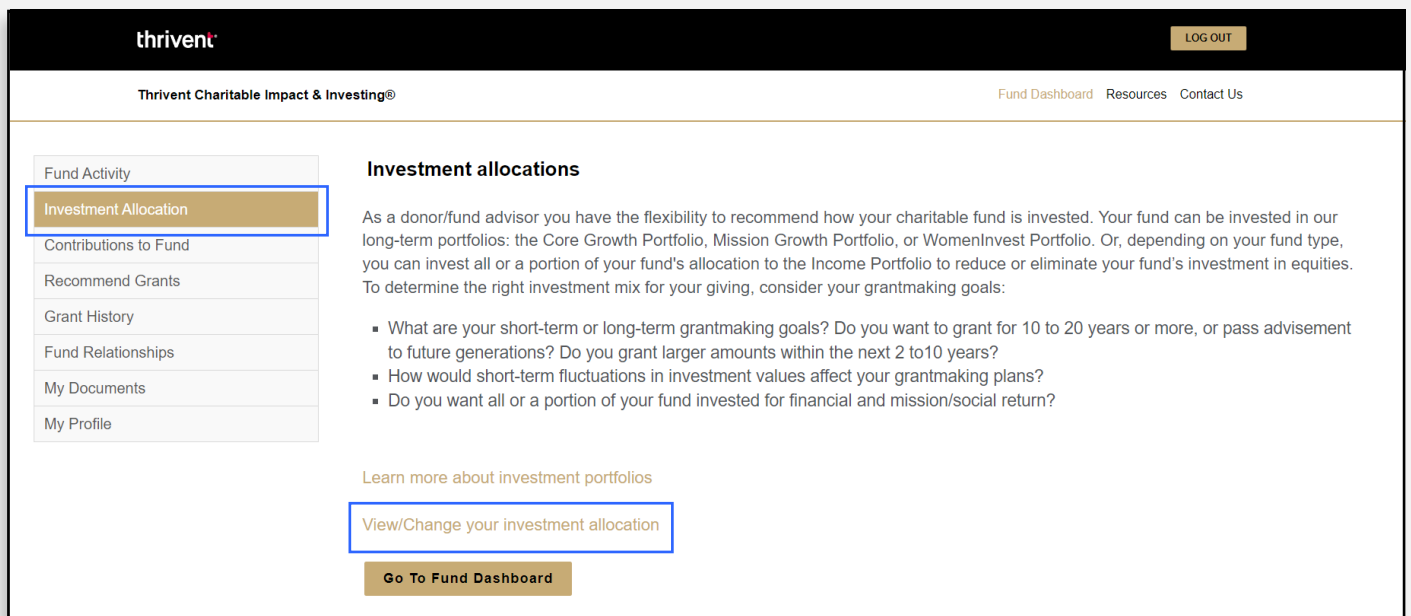


Users can access and/or reset their User ID without staff assistance!



It's mobile responsive! The view automatically adjusts for mobile screens.

Updates will take effect immediately for contributions, and be reallocated when rebalancing occurs at the end of the current month.



The screenshot displays the Thrivent Fund Dashboard. At the top, there's a navigation bar with the Thrivent logo and a 'LOG OUT' button. Below this, a breadcrumb trail shows 'Fund Dashboard' > 'Resources' > 'Contact Us'. The main content area is divided into a sidebar on the left and a main panel on the right. The sidebar lists various fund activities, with 'Investment Allocation' currently selected and highlighted. The main panel features a section titled 'Investment allocations' which provides information about the flexibility to recommend how a charitable fund is invested. It lists three grantmaking goals to consider: short-term vs. long-term goals, the impact of short-term fluctuations, and the balance between financial and mission/social return. Below this text, there are two buttons: 'Learn more about investment portfolios' and 'View/Change your investment allocation'. At the bottom of the main panel, there is a 'Go To Fund Dashboard' button.

Navigation is similar on the [Trusts & Gift Annuities](#) Dashboard.

**Fund Dashboard appearance and functionality may vary based on fund type and device.*

Have questions?
Connect with us.

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Navigation tips

- 1 Data organization transitioned from one to two columns, limiting the need for scrolling.
- 2 Navigation is available through the drop down menu at the top of the page and on the menu bar to the left.
- 3 Quick link buttons, “Recommend a Grant” and “Add to My Fund” are prominently located on the home dashboard and easy to find.
- 4 Toggling between accounts is easier.
- 5 A resources page provides quick access to the resources needed to help plan and manage giving.
- 6 Statements are easy to find.

The screenshot displays the 'thrivent' logo in the top left corner and a 'LOG OUT' button in the top right. Below the logo is the text 'Thrivent Charitable Impact & Investing®'. A navigation bar at the top contains 'Fund Dashboard', 'Resources', and 'Contact Us'. A left-hand menu lists: 'Fund Activity', 'Investment Allocation', 'Contributions to Fund', 'Recommend Grants', 'Grant History', 'Fund Relationships', 'My Documents', and 'My Profile'. The main content area is titled 'Fund Dashboard' and includes a welcome message. It features several sections: 'Your Fund' with fields for ID, name, adviser, and balance, and a 'Change Account' button; 'Announcements' with a link to resources; 'Your financial professional' with an advisor name field; 'Quick Links' with buttons for 'Add To My Fund' and 'Recommend A Grant'; 'Your Giving History' with a date range selector; and 'Grant history' with a table showing 'RECENT GRANTS' and 'GRANT ACTIONS'. Numbered callouts (1-6) point to specific elements: 1 points to the welcome message, 2 points to the top navigation bar, 3 points to the 'Quick Links' buttons, 4 points to the 'Change Account' button, 5 points to the 'Resources' link, and 6 points to the 'Grant history' section.

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