

Investment allocation request

As a fund advisor, you have the flexibility to recommend how your organizational endowment fund is invested.

Your portfolio options	Investment objectives
Core Growth Portfolio 85% equities/15% fixed income	Investing for long-term growth and maximum sustained support to charities far into the future.
Mission Growth Portfolio 85% equities/15% fixed income	Investing for long-term growth and maximum sustained support to charities through investments aligned with mission for positive outcomes throughout our shared community.
WomenInvest Portfolio 75% equities/25% fixed income	Investing for long-term growth and maximum sustained support to charities through investments that do well when women do well.
Income Portfolio 100% fixed income	Investing for stability and maximum grant support within a shorter time horizon.

Investment allocation

If no box is checked, fund assets will be invested in the Mission Growth Portfolio.

I recommend my fund's assets be invested as follows:

<input type="checkbox"/> Core Growth Portfolio 85% equities /15% fixed income	OR	<input type="checkbox"/> Custom Allocation <i>with quarterly rebalancing</i> <i>Please state allocation in whole numbers; total must equal 100%. See Custom Allocation on next page for additional guidance.</i>
<input type="checkbox"/> Mission Growth Portfolio 85% equities /15% fixed income		_____ % Core Growth Portfolio
<input type="checkbox"/> WomenInvest Portfolio 75% equities / 25% fixed income		_____ % Mission Growth Portfolio
<input type="checkbox"/> Income Portfolio 100% fixed income		_____ % WomenInvest Portfolio
		_____ % Income Portfolio

I acknowledge and agree that my recommendation is advisory only, and Thrivent may, at its sole and absolute discretion, follow or decline to follow my recommendation and may change the investment of all or any portion of the assets in the endowment fund. Upon acceptance of my recommendation, the investments will be administered in accordance with the investment policies of Thrivent and my investments are subject to normal market and interest rate fluctuation risks, and any gain or loss generated by the above investments will be reflected accordingly in the endowment fund's value. Donors' portfolio allocation recommendations are typically adjusted within two weeks after request.

Fund name: _____

Fund Advisor signature: _____ Date: _____

Fund Advisor signature: _____ Date: _____

Creating your fund's custom allocation

Please review the portfolio descriptions on page 1 before selecting your organizational endowment fund's investment allocation. To achieve a custom investment mix with more than a 15% fixed income allocation, refer to the table below for recommended allocations to achieve your desired investment mix.

Custom allocation table

To obtain this desired investment mix:			Recommend this allocation:		
			Core growth or mission growth portfolio		Income portfolio
85	/	15	100.00	/	0.00
80	/	20	94.12	/	5.88
75	/	25	88.24	/	11.76
70	/	30	82.36	/	17.64
65	/	35	76.48	/	23.52
60	/	40	70.60	/	29.40
55	/	45	64.72	/	35.28
50	/	50	58.84	/	41.16
45	/	55	52.96	/	47.04
40	/	60	47.08	/	52.92
35	/	65	41.20	/	58.80
30	/	70	35.31	/	64.69
25	/	75	29.43	/	70.57
20	/	80	23.54	/	76.46
15	/	85	17.66	/	82.34
10	/	90	11.77	/	88.23
5	/	95	5.89	/	94.11
0	/	100	0.00	/	100

Notes or special instructions:

Return completed form by mail, fax, or online secure upload to:

Thrivent Charitable Impact & Investing

PO Box 8072

Appleton, WI 54912-8072

Fax: 612-844-4109

<https://www.thriventcharitable.com/share-files>

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