Fund Dashboard instructions: Recommend a grant

Thank you for trusting us with your generosity. We are grateful to serve you.

We celebrate your generosity and hope to make your giving experience seamless and joyful. The following are general instructions to maximize your generosity and support the charities and causes that matter most to you.
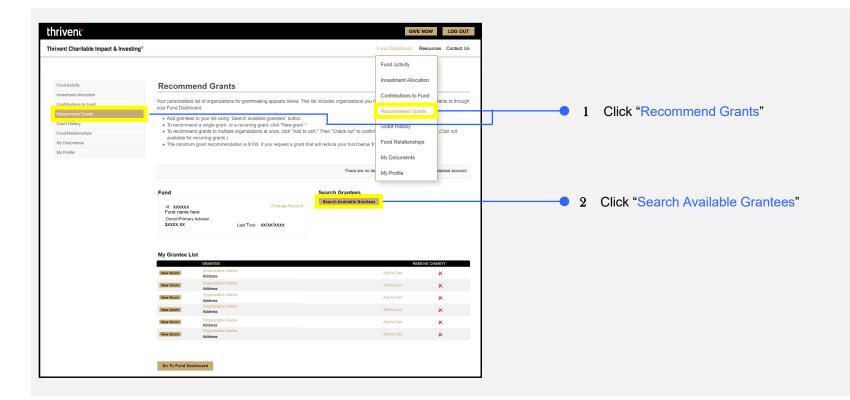
If you have questions, please don't hesitate to reach out to us at thriventcharitable@thrivent.com or 800-365-4172.

Contents

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

Recommend a Grant

1 After you have logged into your Fund Dashboard, 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 or by clicking on the "Recommend Grants" option using the sidebar navigation.

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**.**

Recommend a Grant - 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. *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 Austin") 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" for search results.

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 a Grant – 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 or by clicking on the "Recommend Grants" option using the sidebar navigation.

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*

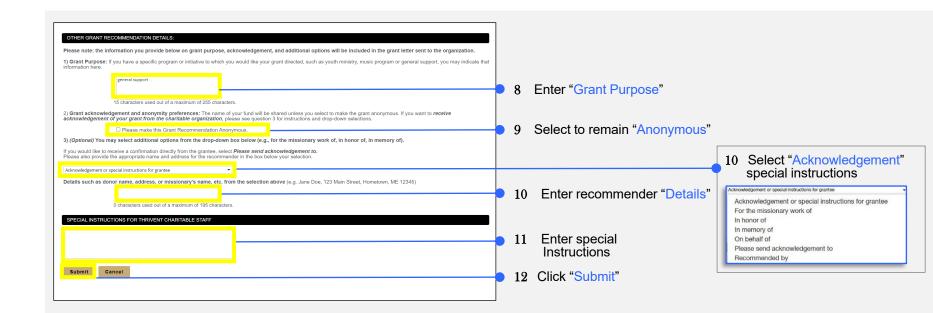

1. Click "Recommend Grants"

2. Click "New Grant"

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

Recommend a Grant – 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 Payment" or "Recurring Payment". If you select recurring, an additional section of choices will appear.

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", or "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 a number into the "# of Payments" field.

7 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.

3 Select "Single Payment" or "Recurring Payment"

4 Enter "Grant Amount"

5 Select frequency "Annually", "Bi-monthly", etc.

6 Enter "# of Payments"

7 Enter "Start" date

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

Recommend a Grant – create a single or recurring grant (continued)

8 In the text field, provide instructions to the grantee organization regarding the "Grant Purpose".

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

10 From the dropdown menu, select any special instructions "Acknowledgement"

Provide your name and address for acknowledgment in the "Details" field.

11 Enter any "Special Instructions" you may have for Thrivent Charitable staff (not the grantee organization).

12 Once all required fields have been completed, click the "Submit" button.

8 Enter "Grant Purpose"

9 Select to remain "Anonymous"

10 Select "Acknowledgement" special instructions

10 Enter recommender "Details"

11 Enter special Instructions

12 Click "Submit"

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

Grant History

1. To view Grant History, 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 "Grant History"
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.

Recommend a Grant – edit an existing recurring grant

To edit an existing recurring grant, please start by visiting 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, edit or cancel the recurring grant. *See next page for further explanation*

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**.**

Recommend a Grant – edit an existing recurring grant

1. To amend your recurring grant (**See previous page for reference on navigating to this page)* provide instructions to the grantee organization regarding the "Grant Purpose" in the provided text field.

2. If you prefer the grant remain anonymous, check the "Please make this Grant Recommendation Anonymous" box option.

3. From the dropdown menu, select "Acknowledgement" special instructions.

4. Provide the recipient special instructions in the "Details" field, such as your name and address for acknowledgment.

5. Enter any "Special Instructions" you may have for Thrivent Charitable staff (not the grantee organization).

6. Once all required fields have been completed, click the "Submit" button.

1. Enter "Grant Purpose"

2. Select to remain "Anonymous"

3. Select "Acknowledgement" special instructions

4. Enter recipient special Instructions - "Details"

5. Enter "Special Instructions"

6. Click "Submit"

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

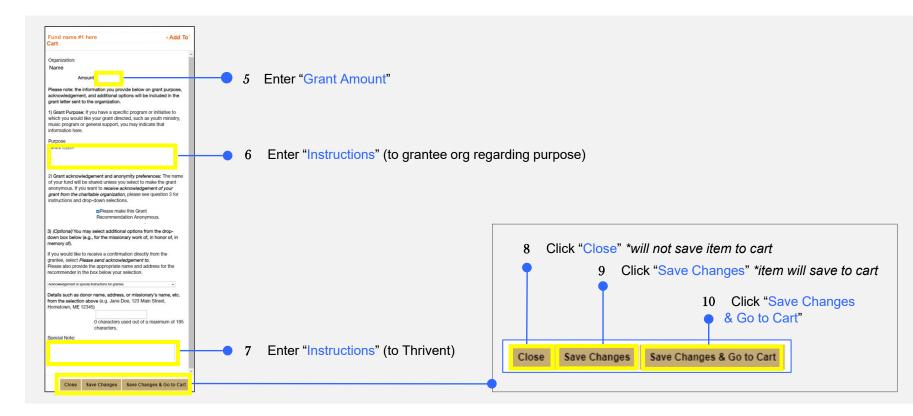# Recommend a Grant – add a grant to your cart

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 or by clicking on the "Recommend Grants" option using the sidebar navigation.

2.   To make a single one-time grant or a recurring grant, click on any "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.

Recommend a Grant – add a grant to your cart (continued)

Clicking on the "New Grant" button will bring you to the below screen. *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 staff (not the grantee organization), enter them 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

5 Enter "Grant Amount"

6 Enter "Instructions" (to grantee org regarding purpose)

8 Click "Close" *will not save item to cart

9 Click "Save Changes" *item will save to cart

10 Click "Save Changes & Go to Cart"

7 Enter "Instructions" (to Thrivent)

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

Recommend a Grant – grant cart detail

Once you arrive at your cart, you can still modify options. *See previous page for reference of how to navigate to your cart*

1   To modify Grants from your cart, click "Edit" or "Remove" under the Actions column.

2   If you make changes, click "Update Cart" to save them.
     Please note: if you do not save your changes, they will be lost upon existing your cart.

3   To add another grant, click "Add Another Charity".

4   When you are finished, click "Check Out". *See next page for grant confirmation*

1   Click "Edit" or "Remove"

2   Click "Update Cart"

3   Click "Add Another Charity"

4   Click "Check Out"

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

Recommend a Grant – grant cart detail (continued)

After clicking the check out option, you will be shown a summary page for a final review (see below). *See previous page for cart specifics*

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.

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**.**

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