

DonorView Fund Dashboard reference guide - charitable trusts and gift annuities

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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.

First-time login

You can access your charitable fund(s) online through DonorView. Here, you can view fund balances and activity, recent fund statements, and other important documents.

- Go to <https://infaith.iphiview.com/infaith/>
- Select "Reset password."

The screenshot shows the Thrivent Fund Dashboard login page. At the top left is the Thrivent logo. At the top right is a "Login" button. Below the logo is the text "Thrivent Charitable Impact & Investing™". To the right of this are navigation links: "Fund Dashboard", "Scholarships", "Contact Us", and "Home". The main heading in the center is "Log in". Below this is a horizontal line. A paragraph reads: "Please log in to our secure site to view and manage your fund or apply for grants and scholarships." Below that is the section "Your Fund Dashboard:" followed by the text "Welcome to the Thrivent Charitable Impact & Investing™ (formerly InFaith Community Foundation) Fund Dashboard, DonorView." There are two input fields: "User" and "Password". To the right of the "User" field is a callout box with the text "Enter username" and a blue arrow pointing to the field. To the right of the "Password" field is a callout box with the text "Enter password" and a blue arrow pointing to the field. Below the "Password" field is a "Login" button. To the left of the "Login" button is a blue link "Reset password" with a blue arrow pointing to a callout box with the text "Forgot password or first time logging in? Start here." At the bottom of the page is a note: "New users: Follow this link for your first time log in after you have received your username from Thrivent."

Verifying your account

After clicking on "**Reset password**," enter the username and phone number that you provided to Thrivent Charitable.

- Enter your **primary telephone number** that you can receive a verification code on. You can select to receive a phone call and a verbal authentication code or you can select to receive a text-based authentication code.

Verifying your account (continued)

Enter the **authentication code** you receive via a phone call or text message.

The screenshot shows a 'Reset Password' form with the following fields and options:

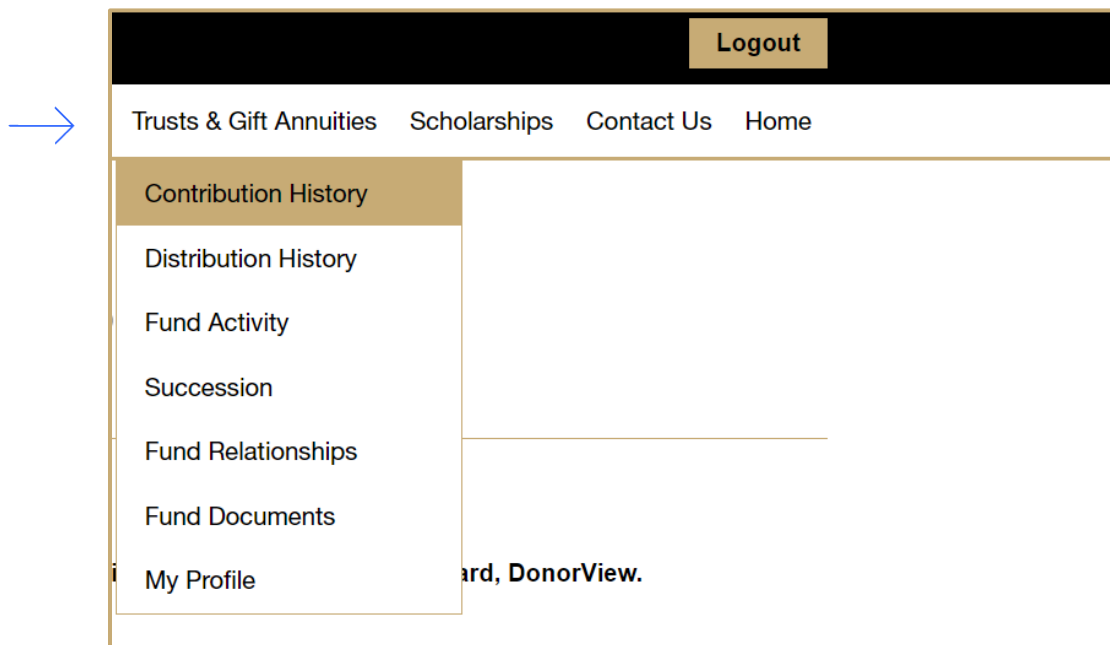
- User ID**: A text input field with a callout box pointing to it containing the text 'Enter user ID'.
- Primary telephone number**: A text input field with a callout box pointing to it containing the text 'Enter primary telephone number'.
- Country**: A dropdown menu currently showing 'United States of America (+1)'.
- Select an authentication method**: Two radio button options: 'Text Message' and 'Call'.
- Buttons**: 'Send verification code' and 'Cancel'.

A callout box on the right side of the form contains the following text: 'Select one of these options, then click **Send verification code** to receive your authentication code. A second method of authentication will enable us to provide better security regarding the access of your fund.'

Trusts & Gift Annuities Fund overview


The "Trusts & Gift Annuities" tab has several subpages with detailed information. These pages can be accessed by:

- 1) Clicking on the menu **Trusts & Gift Annuities**
- 2) Navigating to one of the subpages (i.e., **Contributions History** page, as pictured below).



The Trust & Gift Annuities page contains a summary of your account balance, your last fund statement, and contributions and distributions.

Trusts & gift annuities

Account selector
Your gift annuity/trust name  ← Click here to switch between different trusts/gift annuities

Account balance
Your account balance \$

Your financial professional
Your financial professional name (if applicable)

Statement
[Open Last Statement \(In Acrobat\)](#)
[See All Fund Activity and Statements](#)

Total contributions
Your total contributions
No additions have been made to this account in the past 30 day(s).

Recent/upcoming distributions
Name Date Amount
Your recent/upcoming distributions

[See All Distributions](#)

Contribution history

This page provides the history of your contributions to a selected gift annuity or trust. Use the Advanced Search button to use a specific date range, search for specific keywords, or search by the status of the contribution. Clicking the Export results to Excel link at the bottom of the page saves the list to an Excel spreadsheet. This export also provides more detail about each transaction.

▼
Your gift annuity/trust name 

Search
▼
Duration ← Click here to change the time range displayed (30 days, 60 days, 90 days, 6 months, or last year). Click the Advanced Search for a custom date range.

[Advanced Search](#)

This section will provide further details on the contributions to your fund for the selected time period.



Details

Trans ID	Date	Party	Description	Status	Amount	Type	Gift Letter
Trans ID	Date	Party	Description	Status	Amount	Type	View Letter

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



Clicking the **Export to Pdf** or **Export to Excel** links will cause the Details information to be exported to a file that can be saved on your computer.

Distribution history

This page provides the history of your distributions from a selected gift annuity or trust.

Distribution history

Account selector

Your gift annuity/trust name

Search

Range

Last 30 Days

[Advanced Search](#)



Click here to change the time range displayed (30 days, 60 days, 90 days, 6 months, or last year). Click the Advanced Search for a custom date range.

Distribution history

This table may include upcoming payments that reflect the date a payment is entered. Payments may be entered well in advance of their scheduled distribution date.

Transaction ID	Status	Account	Type	Description	Payment type	Payment amount	Date
Trans ID	Date	Party	Description	Status	Amount	Type	3/27/2021

Fund activity

This page provides information on contributions, distributions, feeds, and the ending balance for the date range selected.

Fund activity

Account selector
Your gift annuity/trust

Search
Range
Last 30 Days

Fund activity report

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

Statements

- [2/1/2021 - 2/28/2021](#)
- [1/1/2021 - 1/31/2021](#)
- [12/1/2020 - 12/31/2020](#)
- [11/1/2020 - 11/30/2020](#)

[Get Acrobat Reader](#)

Click here to switch between different trusts/gift annuities

Click here to view statements by month, quarter, or year

Fund activity details
Ending Balance:

Description	Qty	Price	Amount
Total			\$24,675.16

Export

[Export to Pdf](#)

[Export to Excel](#)

Succession

This page displays the donor-advised fund that will receive the remainder of the trust or gift annuity once the term of the trust or gift annuity is complete.

Succession

Account
Your gift annuity/trust

Benefitting fund

Account name	Percent
Benefitting fund name	100

Fund relationships

Fund relationships

Below is a list of all users that are related to your fund(s). Use the dropdown to view other funds (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 add/remove online access form available [here](#). If you would like to make other changes to this information, please [contact us](#).

Fund

Your gift annuity/trust name

Name	Role	Access
Name	Donor/Adviser-Deceased	Read Only
Name	Former Financial Rep	No Access
Name	Authorized Additional Contact	No Access

Names of individuals who currently have access to your fund, their roles, and their access levels.

Fund documents

Here you will find other documents related to your fund, such as your original Fund Agreement and Tax Packet.

Note: Monthly and quarterly statements can be found on the Fund Activity page.

My documents

Fund

Your gift annuity/trust name

My fund documents

- [Your fund agreement.pdf](#)
- [Tax packet.pdf](#)

My profile

This page contains information pertaining to you. You can make changes to your address, phone, email, username, or password.

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
Personal Information			
Title			
First Name			
Middle Name			
Last Name			
Suffix			
Login Id <input style="width: 80px;" type="text"/>			
Other			
Company			
Job Title			
Date Of Birth			
<input type="button" value="Save"/>			

Click the **Add** button to add a new address, then click **Save**.
Review your addresses and click the "Make mailing" button for the address where you wish to receive any correspondence from Thrivent Charitable.