Thrivent Charitable Impact & Investing™

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DonorView Fund Dashboard reference guide – charitable trusts and gift annuities

Contents

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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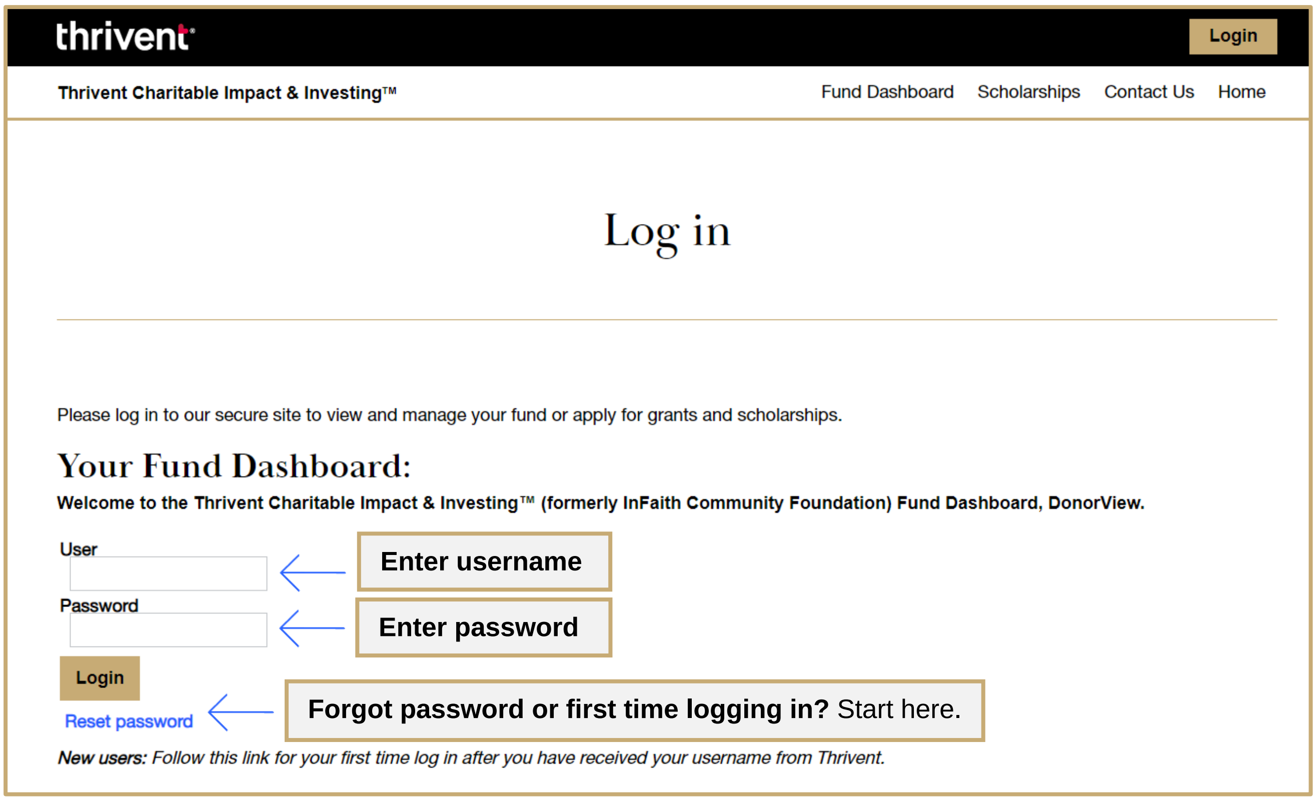
First-time login

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."



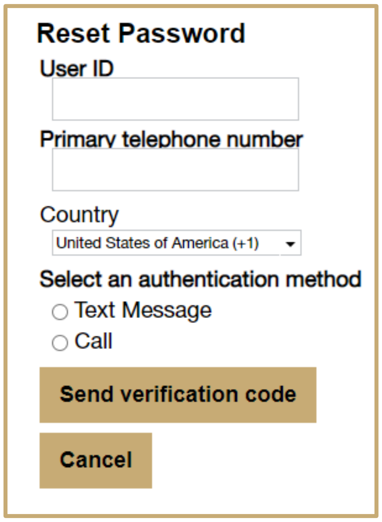
Verifying your account

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.



Enter **user ID**

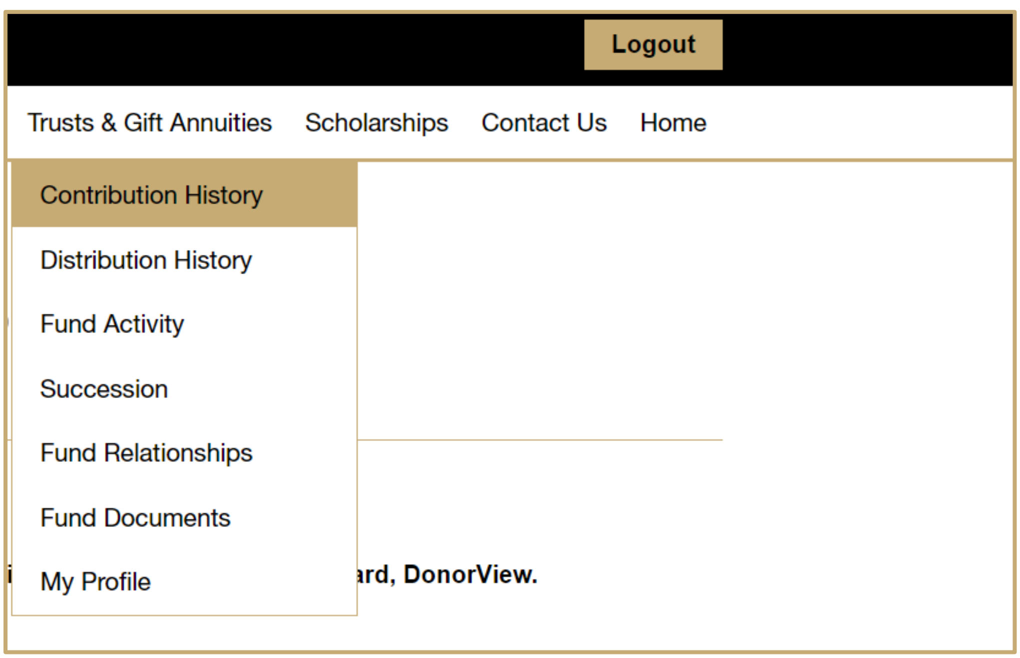
Enter **primary telephone number**

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.

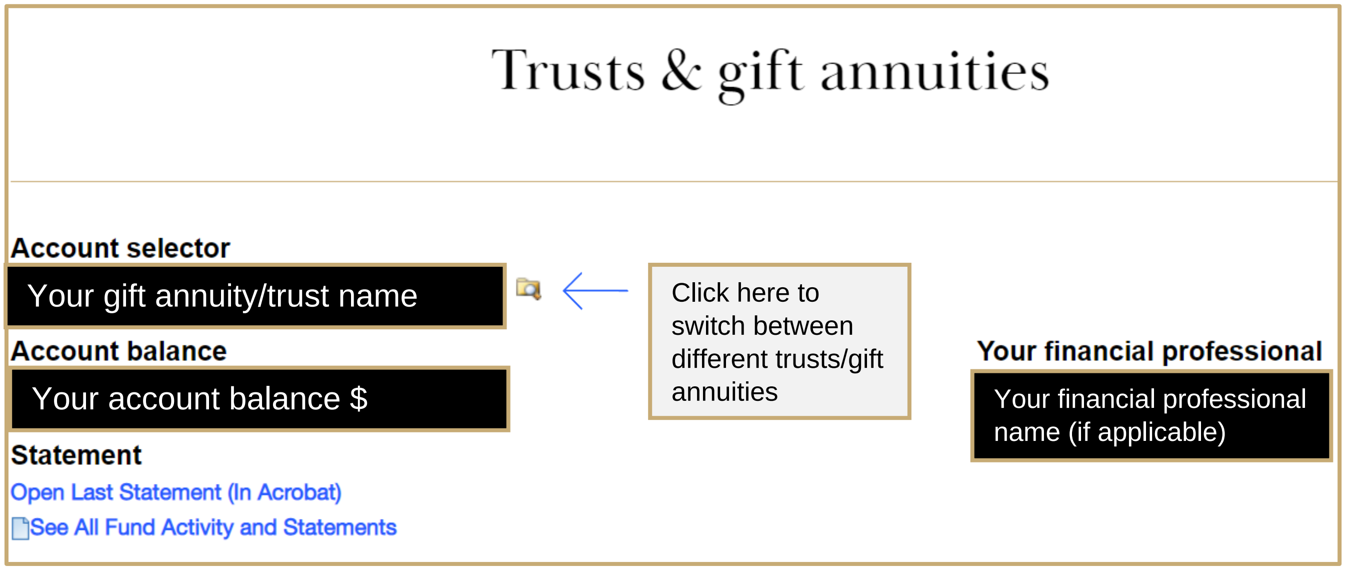
Trusts & Gift Annuities Fund overview

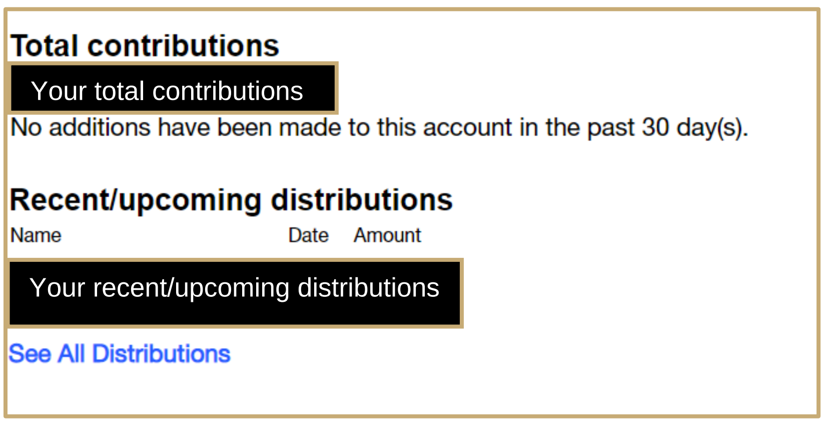
The “Trusts & Gift Annuities” tab has several subpages with detailed information. These pages can be accessed by:

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



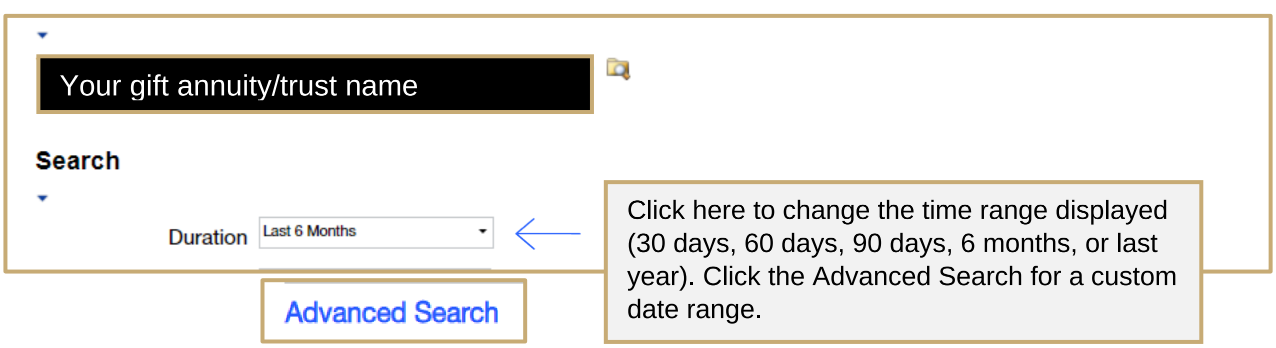
The Trust & Gift Annuities page contains a summary of your account balance, your last fund statement, and contributions and distributions.





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.



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.

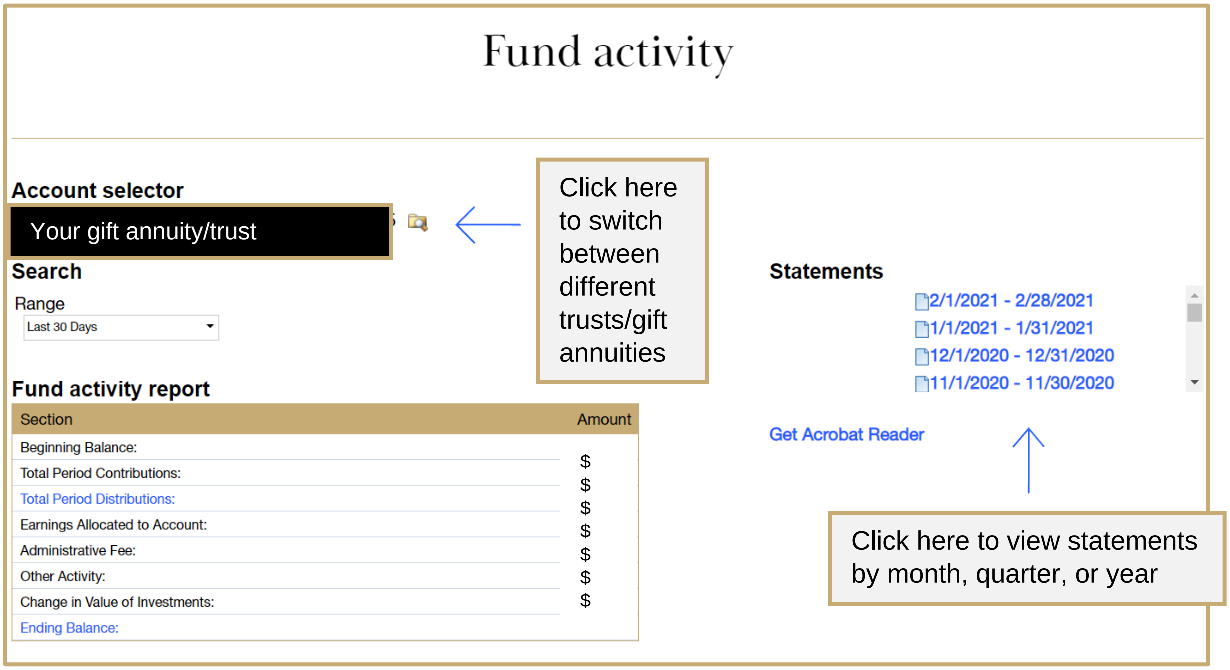
Distribution history

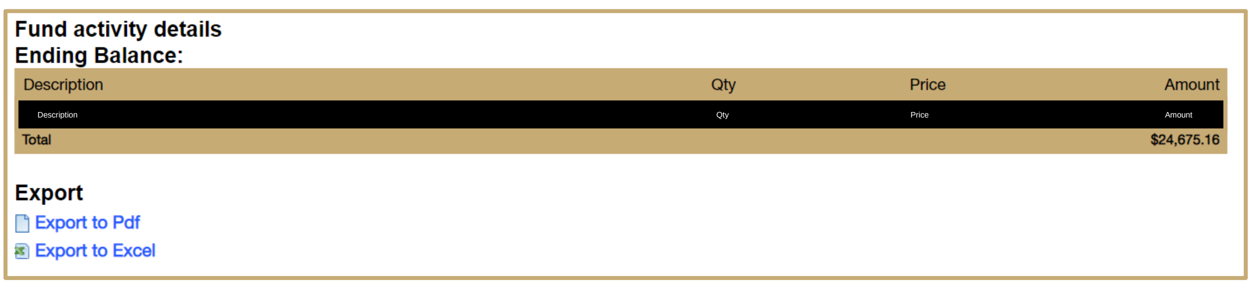
This table may include upcoming payments that reflect the date a payment is entered. Payments may be entered well in advance of their scheduled distribution date.

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

Fund activity

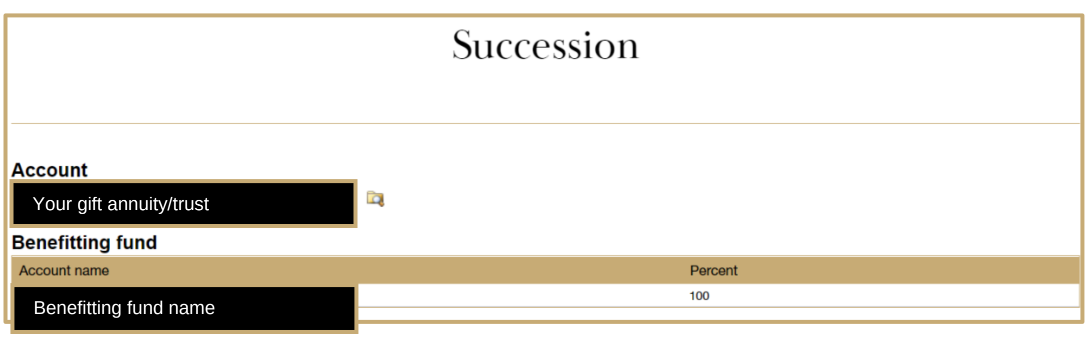
This page provides information on contributions, distributions, feeds, and the ending balance for the date range selected.





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.



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

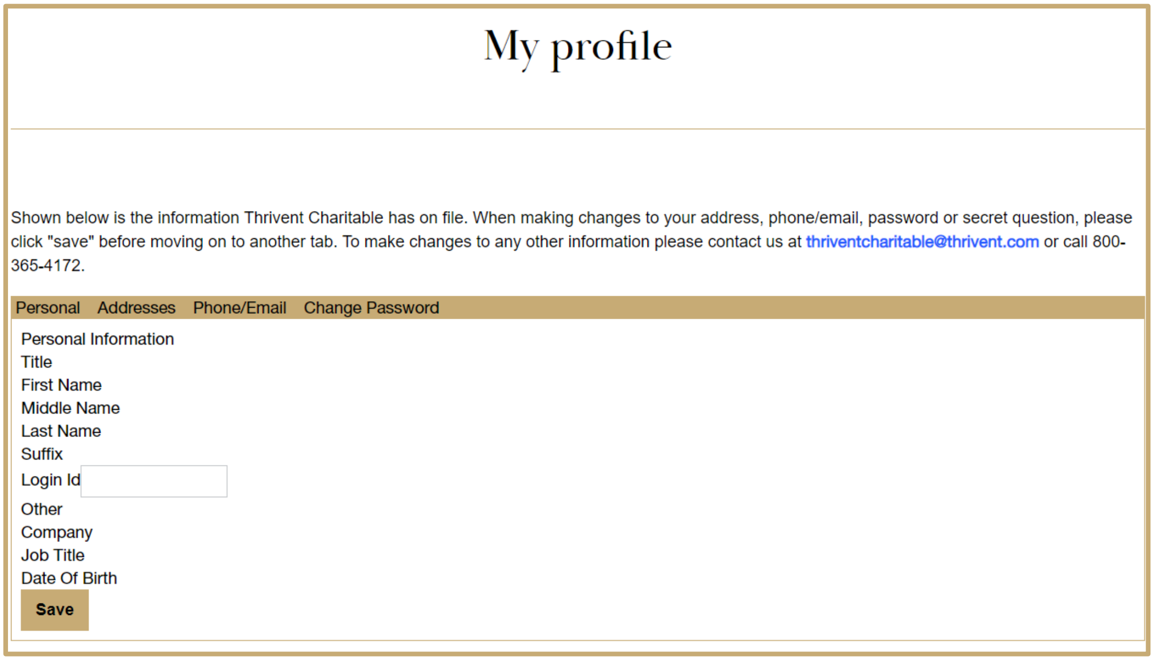
Your gift annuity/trust name

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.



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.