Fund review form

Thank you for trusting Thrivent Charitable Impact & Investing™ (Thrivent Charitable) with your charitable giving plans. We encourage you to revisit your charitable fund(s) every quarter by completing this form and discussing it with your financial advisor. It might be helpful to have your fund agreement on hand as you work on the form. It's a formal document stating what the fund is and how it should work.

Our team is here to help make the most of your giving. If you have any questions as you review your fund, please contact our donor services team at 800-365-4172 or email donorservices@thrivent.com.

Donor/fund advisor name(s): ______________________________

My fund type:

- ○ Advise grants as you go (any charity, anytime).
- ○ Designate charities for automatic annual grants.
  - ○ Designate a cause or field of interest.
  - ○ Designate a scholarship.
  - ○ Designate a collaborative fund.

My fund name(s): ______________________________

Date fund(s) created: ______________________________

Successor advisor(s) (if applicable): ______________________________

My initial gift:

- ○ Give Now (cash, securities, real estate, closely held stock, qualified charitable distributions, crops/farm equipment).
- ○ Give Later (will or living trust, beneficiary proceeds, life insurance, life estate reserved).
- ○ Give & Receive (charitable gift annuities, charitable remainder trusts).

My expectations of my fund(s) (if applicable):

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My favorite charities/causes to support:

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My giving motivation(s):

- ○ I give out of gratitude for all that I have been given.
- ○ I give to model generosity to my family and friends.
- ○ I give to make a positive impact in people's lives and help people in my community.
- ○ Other: ____

My next steps and future giving plans:

- ○ Make an additional gift to my fund.
- ○ Update my fund agreement with new beneficiaries, advisors or contingencies.
- ○ Make changes to my fund's investment allocation.
- ○ List(s) successor advisor to my fund.
- ○ Research charities that match with my charitable goals and values.
- ○ Connect with Thrivent Charitable to learn more about how my grant support was used by charities.
- ○ Other: ____

Learn more about your fund

Log in to your online fund dashboard at thriventcharitable.com to view your fund balance, statements, total contributions and grant history, and to recommend grants to your favorite charities and causes.

Thrivent Charitable Impact & Investing™, a separate legal entity from Thrivent, the marketing name for Thrivent Financial for Lutherans, is a public charity that serves individuals, organizations and the community through charitable planning, donor-advised funds and endowments. Thrivent Charitable Impact & Investing works collaboratively with Thrivent and its financial advisors.

Insurance products, securities and investment advisory services are provided by appropriately appointed and licensed financial advisors and professionals. Only individuals who are financial advisors are credentialed to provide investment advisory services. Visit thrivent.com or FINRA's Broker Check for more information about Thrivent's financial advisors.