

Your giving plan

Set your course

The things we hold dear—our faith, values and life experiences—are what motivate our giving.

That's why an intentional giving plan is so important. It allows you and future generations to spread generosity with purpose. It also provides Thrivent Charitable Impact & Investing (Thrivent Charitable) with the insight needed to work on your behalf.

Through this plan, you also have an opportunity to tell the story of what is central to what you believe and influence the world around us.



Getting started

To begin, set aside time to give this process your full attention. This booklet will prompt you to focus and clarify your giving plans, and articulate your beliefs and desires.

You may find it helpful to go through this process with your family or others who are involved with your plan for giving. Alternatively, Thrivent Charitable staff can assist you with this process and help tailor a giving plan that incorporates your values and interests.

Step 1 Your giving goals: Questions to jumpstart your giving (pages 3–4).

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The questions on the following pages are designed to guide you in creating a focused giving plan.

Your name(s): _____ Date: _____

Your donor-advised fund name: _____

Questions?

Thrivent Charitable is here to serve you and your giving interests. To learn more, contact:

Email: thriventcharitable@thrivent.com

Phone: 800-365-4172

Questions to jump-start your giving

Think of this worksheet as a starting point—a scratchpad for approaching your giving through Thrivent Charitable. If you wish, invite family and friends to the discussion. Once completed, please send a copy to Thrivent Charitable for your donor-advised fund documents, so we can better understand your giving goals and address your intentions.

Why you give. Imagine you're telling your friends or family why you give. What would you share with them?

Your passions. What are you passionate about? What makes your heart soar?

Dream for tomorrow. If you could change one thing about how the world looks in the future, what would it be?

The needs around us. What current local, national or global issues and needs concern you the most?

Your guiding values. What values are important to you? Which do you want expressed through your giving?

Your faith. How does your faith influence your giving?

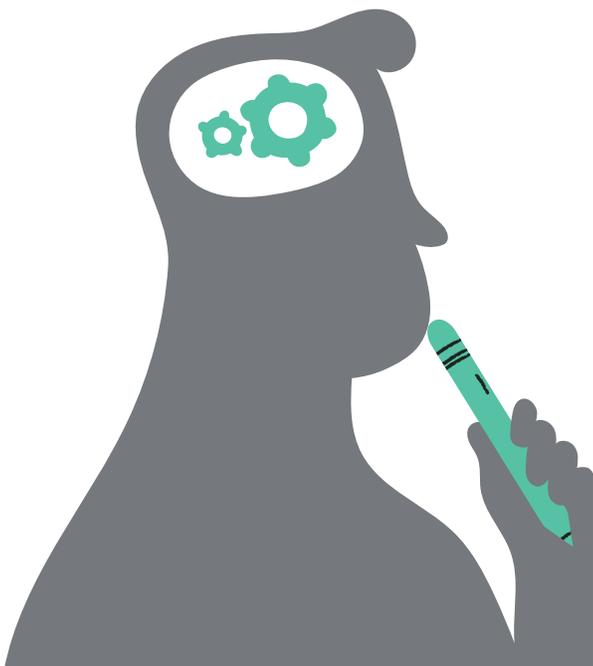
Questions to jump-start your giving

(continued)

Where good work happens. Think of an organization you admire. What do you like about what it does?

Get specific. How do you want your benefiting charity(ies) to use your gift? Do you want to support general operating expenses, address a specific need or target a geographical area?

The big picture. Look at the answers you provided on this worksheet. What patterns do you see? What do your answers tell you about your motivation and focus for giving?



Reflect on your journey

Some people find it easier to identify causes, interests or issues from a list. Which of the following do you want to support the most? (Check all that apply.)

Arts, culture & humanities

- Arts education
- Dance
- Historic preservation
- Libraries
- Museums
- Music
- Theater
- TV, radio, film
- Other (please describe below)

Environmental Issues

- Animal protection/ endangered species
- Natural resources/conservation
- Pollution/global warming
- Zoos/aquariums

Health issues & services

- Alcohol/substance abuse
- Health and spirituality
- Hospitals
- Medical research
- Specific diseases (please describe below)

Faith-based programs & ministries

- Bible translation
- Building/facilities/ capital preservation
- Campus ministries
- Children and youth ministries
- Church administration
- Church body support
- Ecumenical efforts
- Faith-based nursing homes/ long-term care facilities
- Global ministries
- Lay ministry/lay leadership
- Maritime/armed services ministries
- Media ministries (TV, radio, websites, etc.)
- Multicultural ministries
- My church
- Outdoor ministries (camps, etc.)
- Parish nurse programs
- Pastoral continuing education
- Prison ministries
- Senior ministries
- Worship

Education

- Colleges and universities
- Extension/adult learning
- K-12 schools
- Preschools
- Seminaries
- Scholarship support

Disaster relief

- International disaster relief
- U.S. disaster relief

Social issues & services

- Child care/early development
- Crime prevention
- Diversity, equity and inclusion
- Domestic violence/child abuse
- Economically disadvantaged populations
- Employment/jobs
- Food/nutrition/hunger
- Homelessness/housing
- Immigrants/refugee services
- Legal services/legal aid
- Persons with disabilities
- Seniors/elderly
- Social justice
- Women's empowerment
- Other human services (please describe below)

Act on your mission

Consider how you want your donor-advised fund to operate. The nuts and bolts of your giving plan will help ensure you achieve your charitable goals.

1. If you'd like to support more than one organization or cause, share the percentage of your giving below:

Organizations you wish to support	Percentage of your giving
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %

2. Are you interested in funding a charity's general operating expenses?
- Yes
- No
3. Are you interested in capital support (such as building construction or renovations)?
- Yes
- No
4. Are you interested in supporting specific projects or programs of a charity or nonprofit?
- Yes
- No
5. Where do you wish to give?
- Locally
- Nationally
- Globally

6. Are you interested in providing:
- Ongoing support to charities?
- Making one-time gifts to charities?

Your giving would be best described as:

- One major grant each year.
- A few larger grants each year.
- Several smaller grants each year.
- A combination of large and small grants.

7. What information do you need to help you decide which organizations or projects to support?

Share your charitable goals

Besides providing us with information about your charitable goals, there are likely others you will want to inform about your wishes, including family members and friends. Sharing your giving plan allows them to help you live out your desires and fosters a broader awareness for giving.

1. List people who should know about your giving plans.

2. Do you want them involved in the decision-making process? If so, how?

3. If others are involved in the decision-making process, how will you incorporate their input into the process? (We encourage personal meetings, although letters, email exchanges or phone conversations may work for you.)

We're here to serve you

Our team is here to help make the most of your giving plans. Contact us for help:

- Recommending new grants from your fund, checking the status of a grant request, or requesting that a grant be expedited.
- Creating or refine your giving goals.
- Updating your Fund Agreement with new beneficiaries, advisors or contingencies.
- Researching charities that match your charitable goals and values.
- Following up with charities on how grant support was used.
- Discussing unique grantmaking scenarios (e.g., international grants).
- Scheduling a personal visit or phone review of your charitable fund.
- Connecting you to a gift planner to make additional gifts to your fund.

Contact us at 800-365-4172 or email thriventcharitable@thrivent.com.

Learn more about charities

Charity Navigator (charitynavigator.org)

Charity Navigator is America's leading evaluator of charities. Its rating system examines two broad areas of a charity's financial health—how responsibly it functions day-to-day and how well-positioned it is to sustain its programs over time. Each charity is awarded an overall rating of zero to four stars.

GuideStar (guidestar.org)

With free registration you can view information on the 1.8 million nonprofits listed with GuideStar. All are formally registered with the IRS or have proven they meet all IRS criteria for exempt organizations.

Charities Review Council (smartgivers.org)

Visit this website to take a closer look at charities before making your social investment.



Reflect on your giving plan

Your preferences for how, when and to whom you give may change over time. That's why it's important to intentionally take time every three to five years to review this document to determine whether the type, frequency and the recipients of your giving are in sync with your goals and values. If your plan needs readjusting, don't worry!

Contact us at 800-365-4172 or thriventcharitable@thrivent.com.

Thank you

Through this document, you have articulated your values and wishes for your charitable giving. Your responses to questions also provide us with valuable insight so we can assist you with your giving. Once you have completed this booklet, feel free to send a copy to us at:

Thrivent Charitable Impact & Investing

P.O. Box 8072

Appleton, WI 54912-8072

Fax: 612-844-4109

Email: thriventcharitable@thrivent.com

Phone: 800-365-4172

Fax: 612-844-4109



About us

We believe humanity thrives when people make the most of all they've been given. Thrivent Charitable Impact & Investing helps people do just that—bring their generosity to life so they can support the organizations and causes closest to their hearts, now and into the future. Grounded in our purpose to serve, we take a holistic, personalized approach to help our donors create strategic charitable plans and give in a way that best reflects their values and financial priorities. Together, we are committed to creating positive impact and inspiring lasting change in our communities.



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