

Complex asset gift questionnaire

First donor full name

Second donor full name (if applicable)

Asset information

Full legal name of asset owner(s): _____

Asset type (check all applicable types):

- Real estate (complete Thrivent Charitable's Real Estate Gift Questionnaire)
- Crops/farm equipment
- C-Corp closely held stock
- S-Corp closely held stock
- Limited partnership
- General partnership
- Limited liability company
- Other: _____

Type of business: _____

Estimated value of donor's total ownership: \$ _____

How was this value determined? _____

What portion of the asset is the donor giving? _____

How long has this asset been owned by the donor? _____

Donor's cost basis: \$ _____

How did the donor acquire this asset? _____

Is there a deadline for completing this gift?

- No
- Yes, deadline: _____

Are there any potential buyers for this gift asset?

- No
- Yes (please describe): _____

Is there any debt associated with this gift asset?

- No
- Yes (please describe): _____

If the gift is corporate business interests, what is the name and contact information of the business's CPA or CFO?

Next steps

Please include the following documents with this questionnaire.

Real estate

Please complete Thrivent Charitable's Real Estate Gift Questionnaire.

Corporation

- Most recent corporate financial statement
- Most recent federal tax return
- Form 1120S and K-1 for S-Corporations
- Form 1120 for C-Corporations
- Articles of Incorporation
- Bylaws
- List of shareholders and number of shares owned
- Valuation/appraisal (if available)
- Shareholder agreement and amendments

Limited partnership

- Most recent financial statement
- Most recent federal tax return (Form 1065 and K-1)
- Certificate of limited partnership formation
- Partnership agreement with amendments
- List of members and units, or percentage owned
- Valuation/appraisal (if applicable)

Limited liability company

- Most recent financial statement
- Most recent federal tax return (Form 1065 and K-1)
- Articles of Organization
- Operating agreement with amendments
- List of members and units, or percentage owned
- Valuation/appraisal (if applicable)

By signing this document, I understand that Thrivent Charitable Impact & Investing will be relying on the truth and accuracy of my answers to the questions in accepting my gift. I certify that each of the answers is true, accurate and complete to the best of my knowledge.

Signature

Date

Signature

Date

Questions?

Email our team at thriventcharitable@thrivent.com or call 800-365-4172.

Please send this document and any supporting documents by mail or fax to the contact information below:

Thrivent Charitable Impact & Investing
600 Portland Avenue South, Suite 5100
Minneapolis, Minnesota 55415
Phone: 800-365-4172 or Fax: 612-844-4109

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 professionals.

Charitable giving can result in significant tax, legal and financial consequences. Because Thrivent cannot give tax or legal advice, you are strongly encouraged to consult with your personal tax and legal advisors. To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this brochure is not intended to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending another party to any transaction or matter addressed herein.