



600 Portland Ave. S., Ste. 5100
Minneapolis, MN 55415-1665
800-365-4172 • thriventcharitable.com

Charity change

To change the charities recommended receiving support from your donor-advised fund, please complete this form and return it to our team. Please list all the charities you recommend to receive grant distributions from your fund, including the amount of the gift designated to each charity stated in percentages. Percentages will be rounded to the nearest full percentage, with all totaling 100%.

Please note: Only one charity per \$5,000 given can be named. Once this information is received, an addendum to your Fund Agreement will be drafted and returned for your review and signature. If your changes include more charities than space allows, you may make additional copies of this form.

Fund information

Fund name: _____
Fund advisor name: _____
Fund advisor address: _____
City/state/ZIP: _____
Phone: _____ Email: _____

Charity recommendation: charity recipient(s)

Charity name: _____
Address: _____
City/state/ZIP: _____
Phone: _____ Email: _____
Gift amount (as a %): _____

Charity name: _____
Address: _____
City/state/ZIP: _____
Phone: _____ Email: _____
Gift amount (as a %): _____

Charity name: _____
Address: _____
City/state/ZIP: _____
Phone: _____ Email: _____
Gift amount (as a %): _____

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Charity recommendation: charity recipient(s)

Charity name: _____

Address: _____

City/state/ZIP: _____

Phone: _____ Email: _____

Gift amount (as a %): _____

Charity recommendation: Impact funds

% Thrivent Charitable Community Impact Fund

% Disaster Response & Resiliency Impact Fund

% Education Impact Fund

% Health Services Impact Fund

% Human Services Impact Fund

% ELCA Impact Fund

% LCMS Impact Fund

% WELS Impact Fund

% Ecumenical & Interfaith Impact Fund

Grant Instructions

Check one of the boxes below to change your grant distribution preference. If no box is checked, your current grant distribution preferences for your fund will remain in place.

Perpetual Grants: Distribute 5% of fund's value on an annual basis (% subject to change).

Term of Years Grants: Distribute 10% of fund's value annually for 10, 15, or 20 years.

10 years 15 years 20 years

Disclosure of benefiting charities

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.



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Check one of the boxes below to change your disclosure preferences. If no box is checked, your current disclosure preferences for your fund will remain in place.

- Disclose gift to benefiting charities upon receipt of the signed Fund Addendum.
- Disclose gift to benefiting charities with the first grant distribution(s).
- Disclose to benefiting charities after death.
- Never disclose to benefiting charities.

Name (print): _____ Date: _____

Name (print): _____ Date: _____

Notes or special instructions:

Return completed form by mail, fax, or online secure upload to:

Thrivent Charitable Impact & Investing
600 Portland Avenue South, Suite 5100
Minneapolis, MN 55415
Fax: 612-844-4109
<https://www.thriventcharitable.com/share-files>