

Charity change

To change the charities recommended to receive support from your automated donor-advised fund or once your fund transitions from an advise-as-you-go fund to an automated designated 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 are 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 is 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 %): _____

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

Thrivent Charitable Impact & Investing[®] 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. It is a separate legal entity from Thrivent, the marketing name for Thrivent Financial for Lutherans.

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.



Disclosure of benefiting charities

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

PO Box 8072

Appleton, WI 54912-8072

<https://www.thriventcharitable.com/share-files>

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