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Thrivent Charitable Impact & Investing®

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

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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