

# Grant recommendation

Congratulations on continuing to share your blessings and support the organizations and causes you care most about. As you know, your donor-advised fund allows you to recommend grants to IRS-qualified charities at times of your choosing. Upon completion of our due diligence and approval process, grants will be sent directly to benefiting charities.

## Donor/fund information

Fund name: \_\_\_\_\_

Fund number: \_\_\_\_\_

Fund advisor name (s): \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## Grant recommendations

The minimum grant recommendation is \$100. If you request a grant reducing your fund below \$1,000, please contact us. *Note: Grants from your donor-advised fund cannot be used to fulfill a fundraising commitment or pledge.*

Grant amount	Organization's name and address	Purpose (if other than general support)	Optional instructions (e.g., in honor of, in memory of, for the missionary work of, etc.)
Grant total: \$			

### **Acknowledgement**

Grants to charities are accompanied by a grant letter that includes optional information as selected below. Please check only **ONE** box to indicate who should be acknowledged for the grant. Select the first option (Fund name, donor name(s) and address) if you would like the grantee organization to thank you directly. The donor name(s) will consist of the primary fund advisor(s) listed on the charitable fund account, unless you direct us otherwise.

- Fund name, donor name(s) and address
- Fund name and donor name(s)
- Fund name only
- Anonymous

### **Special instructions for Thrivent Charitable staff**

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#### **Donor/fund advisor signature(s)**

I understand that while the vast majority of grant recommendations can be honored, there are common types of grant requests that cannot be made:

1. Grants that provide a more than an incidental benefit to the donor or other third party. This includes all or a portion of the cost to attend a charitable event or banquet, goods bought at charitable auctions, raffle tickets, grants to satisfy a financial obligation of any individual or entity, grants that fulfill fundraising or other commitments or pledges, or that are directed to or for the benefit of specific individuals (e.g., school tuition, scholarships earmarked for individuals).
2. Grants to organizations whose purpose or work is not solely charitable or when the grant will be used for a non-charitable purpose (e.g., cemeteries, VFW, fraternal societies).
3. Grants to private non-operating foundations; and.
4. Grants to supporting organizations (501(c)(3)s identified in 509(a)(3)) that do not have an IRS determination letter stating they are "Type I" or "Type II."

I recommend the grant(s) listed on the reverse side of this form from the named fund. I understand that this recommendation does not represent the payment of any pledge or another financial obligation of the donor nor provides any impermissible benefits.

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

We are committed to acting on your grant recommendations promptly. In some cases, it may take longer to verify an organization's charitable status and complete the due diligence process.

#### **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>

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.