Fund Dashboard
Recommend Grant
Instructions

We celebrate your generosity and hope to make the experience of giving seamless and joyful. The following are general instructions to maximize your generosity and support the charities and causes that matter most to you as you continue your giving journey.

If you have questions, please don’t hesitate to reach out to us at thriventcharitable@thrivent.com or 800-365-4172.

Thank you for trusting us with your generosity. We are grateful to serve you.

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Questions? Please don’t hesitate to contact our team for additional assistance at thriventcharitable@thrivent.com or call 800-365-4172.
Recommend Grants

1. After you have logged into your Fund Dashboard, navigate to the “Recommend Grants” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “Recommend Grants” option from the dropdown menu.

   On this page, you will see instructions to recommend a grant, along with some requirements.

2. To begin finding information on available grantees and/or adding organizations to your cart, click on “Search Available Grantees” button.

   *See next page for further explanation

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Recommend Grants - Add an Organization to Your Grantee List

After you have navigated to the Search Grantee Organizations page you can add an organization to your grantee list. *See previous page for reference*

1. To add an existing organization to your grantee list, begin by typing in the organization’s name or partial name (e.g., try “Salv” instead of “Salvation Army of St. Louis”) into the “Grantee Name” field under the search option.

2. You can also refine your search by selecting the organization’s state in the “State” dropdown.

3. Click “Submit” to search, then review your search.

4. The search results will provide a list of options. Click on the “Organization Name” in the search results to add them to your personal Grantee list.

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Recommend Grants – Create a Single or Recurring Grant

1. Navigate to the “Recommend Grants” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “Recommend Grants” option from the dropdown menu.

2. To create a single or recurring grant, click on any “New Grant” button from the list. The Grant Entry page will then load. *See next page for reference.

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Recommend Grants – Create a Single or Recurring Grant (Continued)

3 Once the Grant Entry screen has loaded (*See previous page for reference on navigating to this page*), select either a “Single Grant Payment” or “Recurring Grant Payment”. If you select recurring, you will have an additional section of choices.

4 Enter the “Grant Amount” you would like to recommend. Be aware of the available balance of your fund.

5 To select the frequency you would like this grant payment to recur, click on the frequency bar and select one of the dropdown options: “Annually”, “Bi-monthly”, “Monthly”, “Quarterly”, “Semi-annually”.

6 After you select the frequency of occurrence, be sure to enter how many times you would like for this payment to occur. To do this, type the “# of Payments”.

7 Then select when you would like your first payment to begin using the “Start” date option. The system will calculate the “End” date based on your selections above.

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Recommend Grants – Create a Single or Recurring Grant (Continued)

Please provide instructions to the grantee organization regarding the “Grant Purpose” of the grant in the text field.

If you would prefer the grant recommendation remain anonymous, check the “Please make this Grant Recommendation Anonymous” box option.

Select to whom you would like an “Acknowledgement” sent from the dropdown menu.

Provide the appropriate name and address in the recommender “Details” field.

Enter any “Special Instructions” you may have for Thrivent Charitable (not the grantee organization).

Once all required fields have been completed, click on the “Submit” button.

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Recommend Grants – Edit an Existing Recurring Grant

To edit an existing recurring grant, please start by visiting the grant history page. *Pictured below on the left*

1. To view, edit, or cancel your active recurring grants, click the “View Your Recurring Grant Schedules” option.

2. Once the Recurring Grant Schedule page has loaded, click on the “Grantee Name” to view details about the grantee organization. *See image below on the right side for reference*

3. Click on the “Details” link to view the history of this recurring grant and to edit or cancel the recurring grant.

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Grant History

1. Navigate to the “Grant History” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “Grant History” option from the dropdown menu.

2. To make changes to the recurring grant, amount, instructions, etc., or to cancel the grant, click the “Back”, “Edit”, or “Cancel” button. **Note:** These changes will only affect future grants, not any grants in the past.

3. To extend the dates of your recurring grant, click the “Cancel & Recreate” button. A new recurring grant will appear with all the same details as the current one. **Note:** Once you click this button the existing recurring grant WILL be cancelled.

4. To view more details about a single occurrence of the recurring grant, click the “View” option.

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Recommend Grants – Add a Grant to Your Cart

1. Navigate to the “Recommend Grants” page by clicking on the Fund Dashboard option in the top navigation bar and selecting the “Recommend Grants” option from the dropdown menu.
2. To make a single one-time grant or a recurring grant, click the “New Grant” button. *This will open the screen on the next page*
3. If you will be making more than one grant, use the grant cart functionality by clicking on “Add to Cart”.
4. Clicking the “X” will remove an organization from your grantee list. This will not delete the organization, but simply remove it from your list.

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Recommend Grants – Add a Grant to Your Cart (Continued)

Clicking on the “New Grant” button will bring you to the below page. *See previous page for reference

5 Enter the “Grant Amount”.
6 Enter “Instructions” to the grantee organization regarding the purpose of the grant.
7 If you have any special “Instructions” to Thrivent Charitable (not the grantee organization) enter it here.
8 By clicking “Close” you will return to the main Grant page without saving the item to your cart.
9 By clicking “Save Changes”, the grant will be added to your cart, and you will return to the main Grant page.
10 When you are finished making grants and ready to check out, click on “Save Changes & Go to Cart”. *See next page for cart

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Recommend Grants – Grant Cart Detail

Once you arrive at your cart, you can still modify your options. *See previous page for reference of how to navigate to your cart

1. To modify your Grants from your cart, click “Edit | Remove”
2. If you have made changes, remember to click “Update Cart” to save them
3. To add another grant currently not in your cart, click “Add Another Charity”.
4. When you are finished, click “Check Out”.

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Recommend Grants – Grant Cart Detail (Continued)

After clicking the check out option, you will be shown a summary page for a final review (see below).

5 Click on “Confirm and Submit” to finalize your grant.

Please note: Your grant request is NOT submitted until you click the Confirm and Submit button.

6 To cancel this recommendation, click the “Cancel” button.

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