

Fund Dashboard Reference Guide - Charitable Trusts & Gift Annuities

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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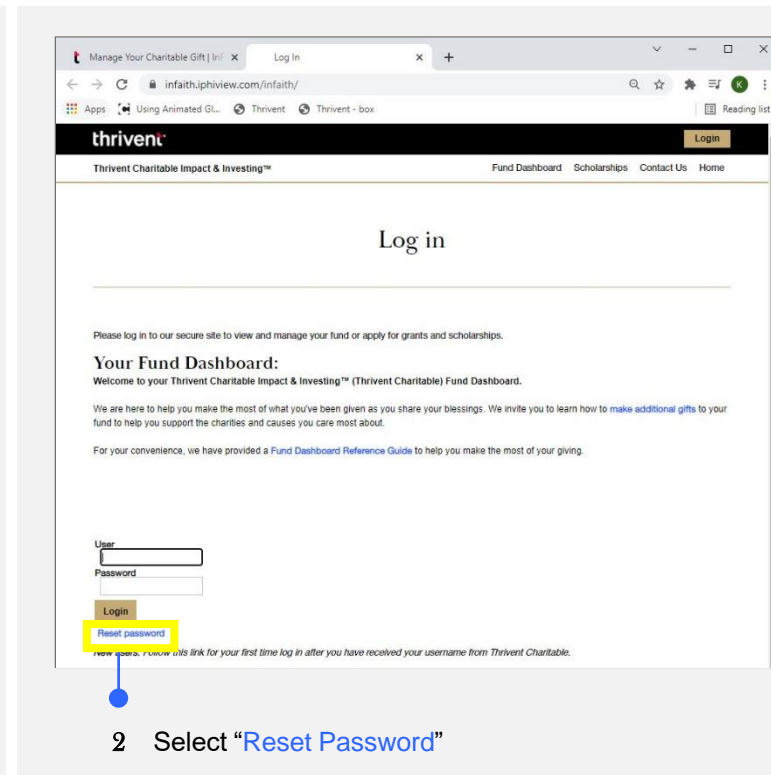
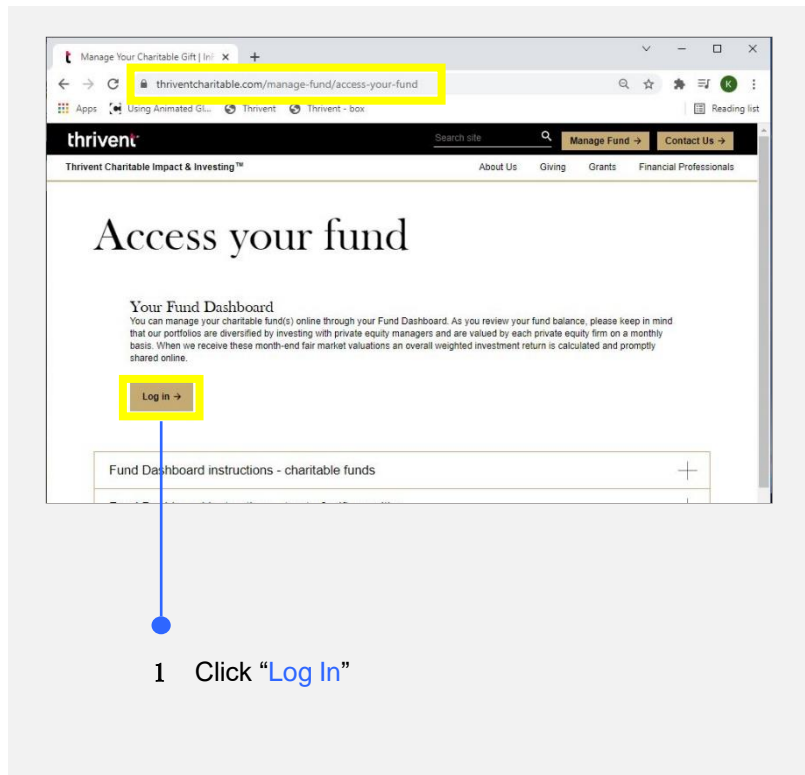
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First Time Login Instructions

You can access your charitable fund(s) online through your fund dashboard where you can view your fund balances and activity, recent fund statements, and other important documents.

To log in for the first time, go to <https://www.thriventcharitable.com/manage-fund/access-your-fund>.

- 1 Once you arrive at the Access Your Fund page, click “Log In”.
- 2 Once you arrive at the Log In screen, select “Reset Password”.



Verifying Your Account

After clicking on reset password, you will be directed to the Reset Password screen

- 1 Here, you will need to enter the “**Username**” you received in your Welcome Email from Thrivent Charitable and the “**Primary Telephone Number**” that you provided to Thrivent Charitable that you can receive a verification code on.
- 2 You can select to receive a text-based (“**Text Message**”) authentication code, or you can select to receive a phone “**Call**” with a verbal authentication code.
- 3 Once you select the method of receipt, click on the “**Send Verification Code**” button.
- 4 Once the Authentication screen loads, enter the “**Authentication Code**” you received via a phone call or text message.

thrivent® Login

Thrivent Charitable Impact & Investing™ Fund Dashboard Scholarships Contact Us Home

Reset Password

User ID

Primary telephone number

Country
United States of America (1)

Select an authentication method

Text Message

Call

Send verification code

Cancel

- 1 Enter “**Username**” & “**Primary Telephone Number**”
- 2 Select “**Text Message**” or “**Call**”
- 3 Click “**Send Verification Code**”

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Reset Password

Please enter the verification code

Continue

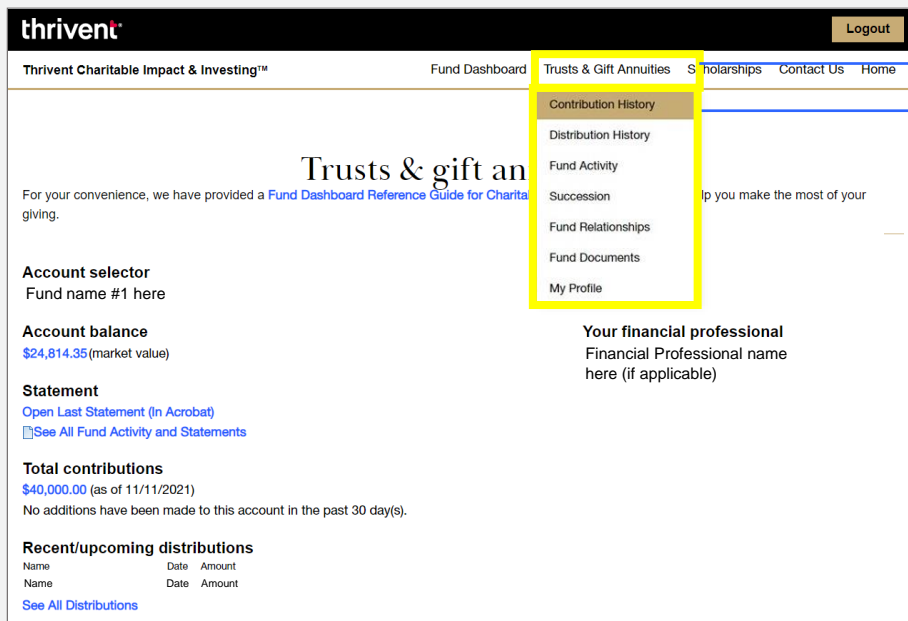
Cancel

- 4 Enter the “**Authentication Code**”

Trusts & gift Annuities Fund Overview

The “Trusts & Gift Annuities” tab has several subpages with detailed information. These pages can be accessed by:

- 1 Clicking on the menu “Trusts & Gift Annuities”
- 2 Navigating to one of the subpages (i.e., “Contribution History” page, as pictured below)



- 1 Click “Trusts & Gift Annuities”
- 2 Navigate to subpage (i.e., “Contribution History” page, as pictured)

Contribution History

- 1 Navigate to the “[Contribution History](#)” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “[Contribution History](#)” option from the dropdown menu.
The Contribution History page provides the history of your contributions to a selected gift annuity or trust.
- 2 To change the time range that the search pulls from, pick an option from the “[Range](#)” dropdown menu.
- 3 To set a specific date range, search for specific keywords, or search by the status of the contribution, click on “[Advanced Search](#)” to allow for an advanced search option to expand. Once this option has expanded, you may refine your search.
- 4 Clicking the “[Export to Excel](#)” link at the bottom of the page saves the list to an Excel spreadsheet. This export will also provide more detail about each transaction within the spreadsheet after the export has finished.

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Contribution History

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My Profile

Account selector
Gift / Annuity name #1 here

Search

Range
Last 30 Days

Advanced Search

Contribution history

Transaction ID	Status	Account	Organization	Type	Payment type	Payment amount	Date
No records to display.							

Export

Export to Pdf

Export to Excel

1 Navigate to subpage (i.e., “[Contribution History](#)” page, as pictured)

2 Click “[Range](#)” drop down

3 “[Advanced Search](#)”

4 Click “[Export to Excel](#)”

Search

Duration Last 6 Months

Find

Exact Match

Status -ALL-

Simple Search

Submit

Distribution History

- 1 Navigate to the “[Distribution History](#)” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “[Distribution History](#)” option from the dropdown menu.

On this page, you can easily view the history of your distributions from your selected gift annuity or trust and display the information by custom date ranges.

- 2 To change the time range for your search, select an option from the dropdown menu under “[Range](#)”. Options include 30 days, 60 days, 90 days, 6 months, or the last year.
- 3 Click the “[Advanced Search](#)” option to enter a custom date range.

The screenshot shows the Thrivent website interface. The top navigation bar includes "Thrivent Charitable Impact & Investing™", "Fund Dashboard", "Trusts & Gift Annuities", "Scholarships", "Contact Us", and "Home". A "Logout" button is in the top right. A dropdown menu is open under "Trusts & Gift Annuities", with "Distribution History" highlighted. A blue line connects this menu item to the instruction "1 Click 'Distribution History'". Below the navigation, the page title "Distribution history" is visible. The "Account selector" section has a placeholder "Gift / Annuity name #1 here". The "Search" section has a "Range" dropdown menu set to "Last 30 Days" and an "Advanced Search" button. A blue line connects the "Advanced Search" button to the instruction "3 Click 'Advanced Search'". A second blue line connects the "Range" dropdown menu to a callout box containing a list of range options: "Last 30 Days", "Last 60 Days", "Last 90 Days", "Last 6 Months", "Year To Date", "Before", and "Custom Date Range". This callout box is associated with the instruction "2 Select 'Range'".

1 Click “[Distribution History](#)”

2 Select “[Range](#)”

3 Click “[Advanced Search](#)”

Fund Activity

- 1 Navigate to the “Fund Activity” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “Fund Activity” option from the dropdown menu.
- 2 To view statements by month, quarter, year, select a “Statement” option from the scroll down menu on the right.
- 3 If you have more than one trust/gift annuity account, you can switch between them under the “Account Selector” section.
- 4 To see information on your contributions, distributions, fees, and the ending balance, select a date “Range” on your Fund Activity page.

The screenshot shows the Thrivent website interface for the Fund Activity page. The top navigation bar includes 'Thrivent Charitable Impact & Investing™', 'Fund Dashboard', 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. A 'Logout' button is in the top right. The main content area is titled 'Fund activity'. Below the title, there is an 'Account selector' section with a text input field labeled 'Gift / Annuity name #1 here'. A 'Search' section includes a 'Range' dropdown menu currently set to 'Last 30 Days'. The 'Fund activity report' section contains a table with columns for 'Section' and 'Amount'. Below this is the 'Fund activity details' section, which includes a table for 'Ending Balance: from 10/12/2021 to 11/11/2021' with columns for 'Description', 'Qty', 'Price', and 'Amount'. At the bottom, there are 'Export' options for 'Export to Pdf' and 'Export to Excel'. Four numbered callouts are present: 1 points to the 'Fund Activity' dropdown menu, 2 points to the 'Statement' dropdown menu, 3 points to the 'Account selector' field, and 4 points to the 'Range' dropdown menu. A separate inset shows the 'Range' dropdown menu expanded, listing options: 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Last 6 Months', 'Year To Date', 'Before', and 'Custom Date Range'.

1 Click “Fund Activity”

2 Select “Statement”

3 Select “Account”

4 Select “Range”

Succession

- 1 Navigate to the “[Succession](#)” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “[Succession](#)” option from the dropdown menu.
- 2 This page displays the donor-advised “[Fund](#)” that will receive the remainder of your trust or gift annuity once the term of the trust or gift annuity is complete.

The screenshot shows the Thrivent website interface. The top navigation bar includes 'Thrivent Charitable Impact & Investing™', 'Fund Dashboard', 'Trusts & Gift Annuities', 'Scholarships', 'Contact Us', and 'Home'. A 'Logout' button is in the top right. The 'Trusts & Gift Annuities' dropdown menu is open, showing options: Contribution History, Distribution History, Fund Activity, Succession (highlighted), Fund Relationships, Fund Documents, and My Profile. The main content area displays 'Succession' and an 'Account' section with the text 'Gift / Annuity name #1 here'. Below this is a 'Benefitting fund' table with two columns: 'Account name' and 'Percent'. The table contains one row: 'Benefitting Fund name #1 here' and '100'. A yellow box highlights the table, and a blue line points from the 'Succession' menu item to the table.

Account name	Percent
Benefitting Fund name #1 here	100

1 Click “[Succession](#)”

2 “[Fund](#)” Name

Fund Relationships

- 1 Navigate to the “[Fund Relationships](#)” page by clicking on the Trust & Gift Annuities option in the top navigation bar and selecting the “[Fund Relationships](#)” option from the dropdown menu.
Fund relationships is a simple way to view all those you have indicated as associated with your fund and what level of access you have given them.
- 2 If you would like to make changes to this list, click on the “[Here](#)” link.
- 3 You can view “[Details](#)” such as the name of individuals (Thrivent Financial Advisors) who currently have access to your fund, their roles, and their access levels.

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Thrivent Charitable Impact & Investing™ Fund Dashboard Trusts & Gift Annuities Scholarships Contact Us Home

Fund relationships

Below is a list of all users that are related to your fund(s). Use the dropdown to view other funds (if you have more than one charitable fund). You can make changes to those who have access to your fund(s) by filling out the add/remove online access form available [here](#). If you would like to make other changes to this information, please [contact us](#).

Fund
Thrivent Charitable Community Impact Fund – Fund Id 45395
Thrivent Charitable Impact Investing

Name	Role	Access
VanSpriell, Brad	Adviser-requested access	Full Access
Sauer, Rebecca	Adviser-requested access	Full Access
VanSpriell, Bradley Charles	Adviser-requested access	Read Only
Sommer Larson, Alyssa	Adviser-requested access	Full Access
Shamey, Greg	Adviser-requested access	Full Access
Borton, Kim	Adviser-requested access	Full Access
Johnson, Nikki	Adviser-requested access	Full Access
Darling, Jennifer	Adviser-requested access	Full Access
Voracek, Karen	Adviser-requested access	Full Access
Medic, Katelyn	Adviser-requested access	Full Access
Zastrow, David	Adviser-requested access	Full Access
Pautson, Katie	Adviser-requested access	Full Access

1 Click “[Fund Relationships](#)”

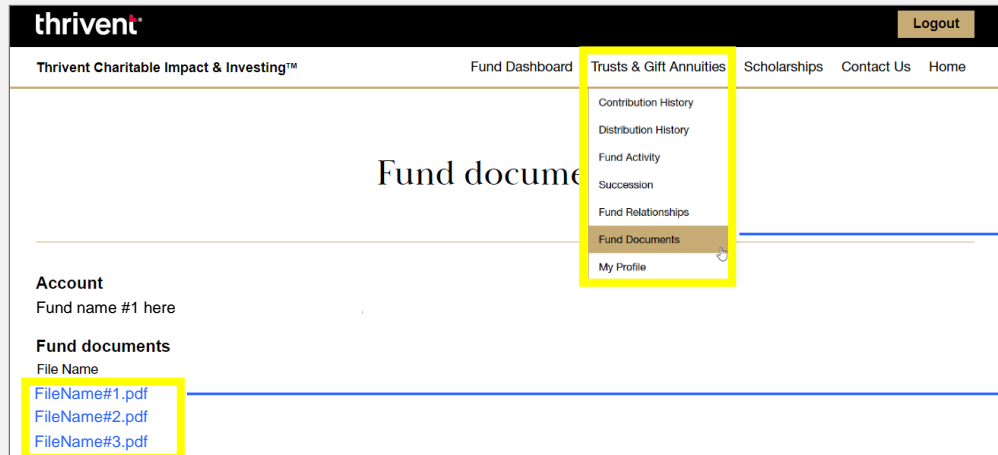
2 Click “[Here](#)”

3 “[Details](#)”

Fund Documents

- 1 Navigate to the “Fund Documents” page by clicking on the Trusts & Gift Annuities option in the top navigation bar and selecting the “Fund Documents” option from the dropdown menu.
- 2 On the Fund Documents page, you will find documentation related to your fund such as your original Fund Agreement and Tax Packet.

Note: Monthly and quarterly statements can be found on the Fund Activity page.



1 Click “Fund Documents”

2 Fund Agreement & Tax Packet

My Profile

- 1 Navigate to the “My Profile” page by clicking on the Trusts & Gift Annuities option in the top navigation bar and selecting the “My Profile” option from the dropdown menu.

This page contains information about you.

- 2 You can make changes to your address, phone, email, username, or password by clicking on that topic on the gold navigation bar: “Addresses”, “Phone/Email”, or “Change Password”

**Please see an example of navigating to a topic from the gold navigation bar on the following page*

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Thrivent Charitable Impact & Investing™ Fund Dashboard Trusts & Gift Annuities Scholarships Contact Us Home

My profile

Contribution History
Distribution History
Fund Activity
Succession
Fund Relationships
Fund Documents
My Profile

Shown below is the information Thrivent Charitable has on file. When making changes to your password or secret question, please click "save" before moving on to another tab. To make changes to any other information please contact us at thriventcharitable@thrivent.com or call 800-365-4172.

Personal Addresses Phone/Email Change Password

Last Changed 7/14/2021 3:58:40 PM

Expires On Never

Old Password

New Password

Re-type New Password

Requirements Must not contain your user ID anywhere in the password.
Must be at least 6 characters long.
Must not be longer than 10 characters.
Must contain at least 2 letters.
Must contain at least 2 number(s).

Save

1 Click “My Profile”

2 Click “Addresses”, “Phone/Email”, or “Change Password”

My Profile (Continued)

Below is an example of navigating to the Addresses topic from the gold navigation bar. **See previous page for reference*

Once the addresses tab from the gold navigation bar has opened to view, you can make updates to it.

- 1 This is also where you will review your addresses and click the “[Make Mailing](#)” for the address where you wish to receive any correspondence from Thrivent Charitable.
- 2 To add a new address, click the “[Add](#)” button.
- 3 Once you have made the necessary updates, click the “[Save](#)” button to submit these changes.

Address	Address Type	Mailing Address	Actions
Address	Unspecified	Yes	Make Mailing Add

[Save](#)

1 Click “[Make Mailing](#)”

2 Click “[Add](#)”

3 Click “[Save](#)”



**Thrivent Charitable
Impact & Investing™**

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

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.