

# Log In Instructions for Charitable Trusts & 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](mailto: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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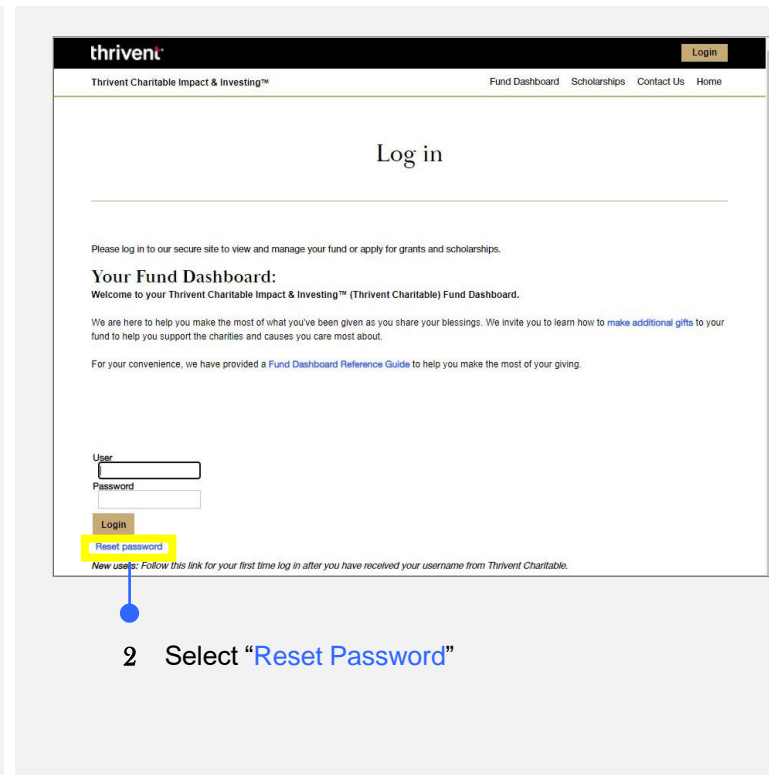
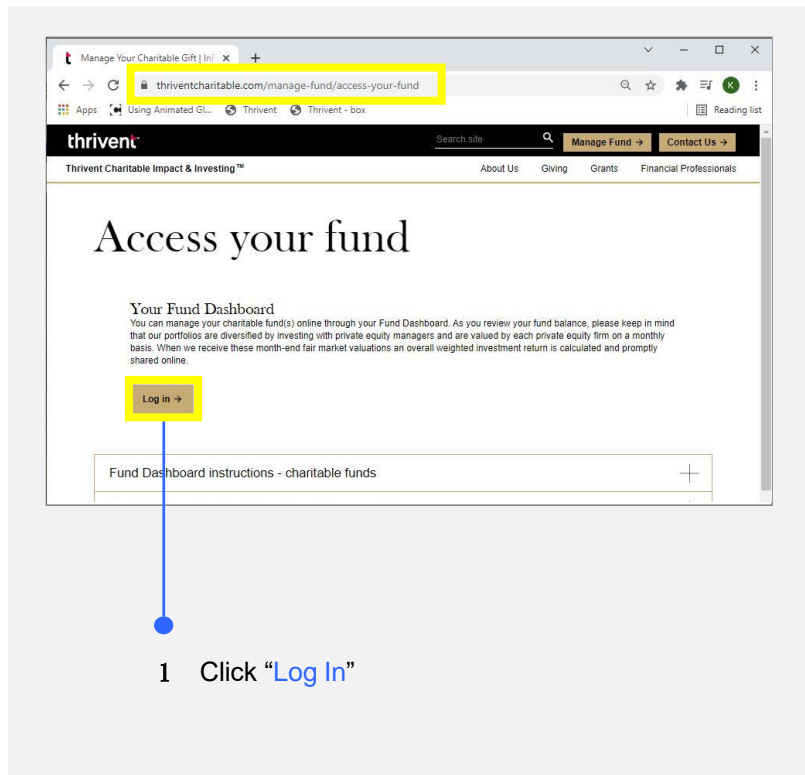
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# Step 1: Log In to Your Fund Dashboard

You can access your charitable fund(s) online through your fund dashboard. Here, 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”.



## Step 2: Verify 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.

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**Reset Password**

User ID

Primary telephone number

Country  
United States of America (x1)

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**”

## Step 3: Enter Your New Password

- 1 Enter a new password in the “New Password” field and also in the Re-Type field.

When entering a new password for your account, please follow the below requirements:

- Passwords must not contain your user ID anywhere in the password
- Passwords must be at least 6 characters long
- Passwords cannot be longer than 10 characters
- Passwords must contain at least 2 letters
- Passwords must contain at least 2 number(s)

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### Reset 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).

Login

Cancel

- 1 Enter “New Password”

## Step 4: Log In & Explore Your Fund Dashboard

Once your password has been submitted, and your account is confirmed, you will be able to use your new password to log in to your Fund Dashboard.

Once you are logged in, you can view your:

- 1 **Please note:** If you have more than one trust/gift annuity, you can switch between them under the “Account” selector section
- 2 Your financial professional (If applicable)
- 3 Your account balance
- 4 Your recent and historical fund statements
- 5 Your contributions to your fund
- 6 Your recent and upcoming distributions

The screenshot shows the Thrivent Fund Dashboard for Trusts & gift annuities. The page title is "Truſts & gift annuities". Below the title, there is a message: "For your convenience, we have provided a [Fund Dashboard Reference Guide for Charitable Trust & Gift Annuities](#) to help you make the moſt of your giving."

The dashboard is divided into several sections:

- Account selector:** A dropdown menu showing "Fund name #1 here".
- Account balance:** A box showing "\$24,814.35 (market value)".
- Statement:** Two links: "Open Last Statement (In Acrobat)" and "See All Fund Activity and Statements".
- Total contributions:** A box showing "\$40,000.00 (as of 11/11/2021)". Below it, a note says "No additions have been made to this account in the paſt 30 day(s)."
- Recent/upcoming distributions:** A table with columns "Name", "Date", and "Amount".

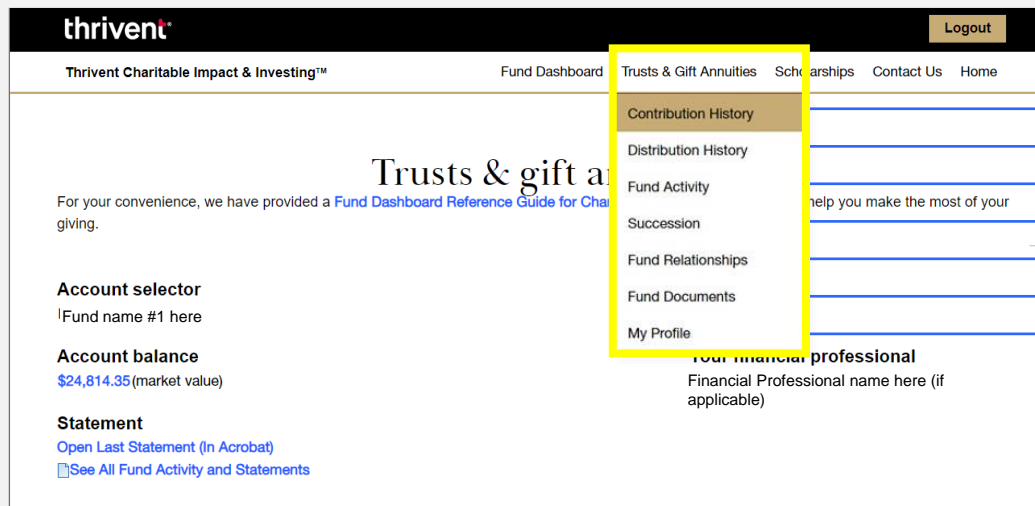
Blue lines connect numbered callouts to these sections:

- 1 Select "Account"
- 2 Financial Professional
- 3 Account Balance
- 4 Recent & Historical Fund Statements
- 5 Contributions
- 6 Recent / Upcoming Distributions

## Step 4: Log In & Explore Your Fund Dashboard (Continued)

While logged in, you can also use the “Trusts & Gift Annuities” option in the top navigation bar to navigate to other helpful pages:

- 1 Contribution History
- 2 Distribution History
- 3 Fund Activity
- 4 Succession
- 5 Fund Relationships
- 6 Fund Documents
- 7 My Profile



- 1 Contribution History
- 2 Distribution History
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**Thrivent Charitable  
Impact & Investing™**

**Questions?** Please don't hesitate to contact our team for additional assistance at [thriventcharitable@thrivent.com](mailto: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.*