

Give to charities upon your death

There are several simple, flexible ways to support charitable organizations.

Your assets—IRAs or other qualified retirement assets, life insurance, annuities, investments or real estate—support charities and causes that mean the most to you. Sharing all or a portion of these assets upon your death has several benefits:

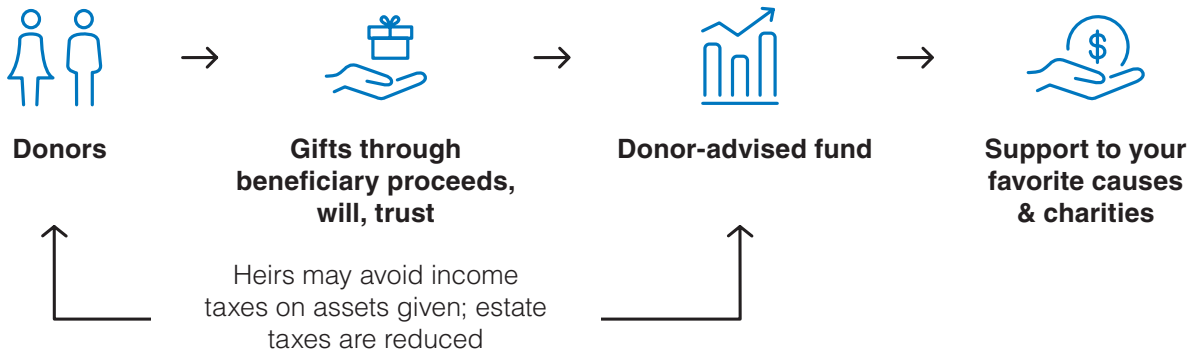
- You can make a significant gift, oftentimes larger than what you could have made while living.
- You maintain control of your assets while living and have the flexibility to make changes as needed.
- Through a donor-advised fund, your gift supports multiple charities through one simple designation.

Ways to give

Bequests through your will. You can give assets such as stocks, bonds or real estate through your will or revocable trust. Upon your death, these assets are removed from your estate, thereby potentially reducing related estate taxes. You can designate: 1) a percentage of your estate; 2) a specific dollar amount or asset; 3) a remainder amount after other beneficiaries have been paid; or 4) Thrivent Charitable Impact & Investing™ (Thrivent Charitable) as a contingent beneficiary.

Beneficiary proceeds. It's easy to designate Thrivent Charitable as beneficiary of your IRA or other qualified retirement plan, annuity or life insurance. Simply complete the beneficiary form for the assets you wish to give. Your heirs may avoid paying income taxes on assets given, and the value of your estate may be reduced for estate tax purposes. You can designate all or a percentage of the assets, or name Thrivent Charitable Impact & Investing as contingent beneficiary. Another advantage: You don't need to pay attorney fees to put these plans in place.

How it works



Donor story

The donors. A couple, 66 and 72, wanted to share what's left of their assets (upon death) with their adult children, church and other favorite charities. They're aware IRA assets inherited by family are subject to income tax and possibly estate tax.

Their gift. They named Thrivent Charitable as beneficiary of their IRAs and established a donor-advised fund to support their church and two additional charities. Their adult children are named in their wills to receive the remaining assets from the estate.

About us

We believe humanity thrives when people make the most of all they've been given. Thrivent Charitable Impact & Investing helps people do just that—bring their generosity to life so that they can support the organizations and causes closest to their hearts, now and into the future. Grounded in our purpose to serve, we take a holistic, personalized approach to help our donors create strategic charitable plans and give in a way that best reflects their values and financial priorities. Together, we are committed to creating positive impact and inspiring lasting change in our communities.

Are you ready to make the most of your giving?

We can help you determine if a gift of bequests or beneficiary proceeds is right for you. Contact your Thrivent financial professional, visit thriventcharitable.com or call 800-365-4172.

Donor-advised fund features

When you give through Thrivent Charitable, your donor-advised fund features charities and causes of your choosing:

- Name multiple charities or causes to benefit.
- Make charity changes simply by contacting us.
- Remain anonymous to benefiting charities if you wish.
- Include family, friends and future generations as successor advisors to carry on your giving legacy.



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.

Donors must itemize deductions to receive a charitable income tax deduction. Charitable giving can result in tax, legal and financial consequences. Thrivent Charitable Impact & Investing does not provide legal, accounting or tax advice. Consult your attorney or tax professional.

To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this brochure is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending another party to any transaction or matter addressed herein.