Complex asset gift questionnaire

First donor full name

________________________________________

Second donor full name (if applicable)

________________________________________

Asset information

Full legal name of asset owner(s): ____________________________

________________________________________

Asset type (check all applicable types):

○ Real estate (complete Thrivent Charitable's Real Estate Gift Questionnaire).
○ Crops/farm equipment.
○ C-Corp closely held stock.
○ S-Corp closely held stock.
○ Limited partnership.
○ General partnership.
○ Limited liability company.
○ Other: ______________________________________

Type of business: ______________________________________

________________________________________

Estimated value of donor’s total ownership: $ __________

How was this value determined? __________________________

________________________________________

What portion of the asset is the donor giving? __________

________________________________________

Donor’s cost basis: $ __________________________

How did the donor acquire this asset? __________________________

________________________________________

Is there a deadline for completing this gift?

○ No
○ Yes, deadline: __________________________

Are there any potential buyers for this gift asset?

○ No
○ Yes (please describe): __________________________

________________________________________

Is there any debt associated with this gift asset?

○ No
○ Yes (please describe): __________________________

________________________________________

If the gift is corporate business interests, include the name and contact information of the business’s CPA or CFO:

________________________________________

________________________________________
Next steps

Please include the following documents with this questionnaire.

**Real estate**

Please complete Thrivent Charitable’s Real Estate Gift Questionnaire.

**Corporation**
- Most recent corporate financial statement and Bylaws.
- Most recent federal tax return.
- Form 1120S and K-1 for S-Corporations.
- Form 1120 for C-Corporations.
- Articles of Incorporation.
- Bylaws.
- List of shareholders and number of shares owned.
- Valuation/appraisal (if available).
- Shareholder agreement and amendments.

**Limited partnership**
- Most recent financial statement.
- Most recent federal tax return (Form 1065 and K-1).
- Certificate of limited partnership formation.
- Partnership agreement with amendments.
- List of members and units, or percentage owned.
- Valuation/appraisal (if applicable).

**Limited liability company**
- Most recent financial statement.
- Most recent federal tax return (Form 1065 and K-1).
- Articles of Organization.
- Operating agreement with amendments.
- List of members and units, or percentage owned.
- Valuation/appraisal (if applicable).

By signing this document, I understand that Thrivent Charitable Impact & Investing will be relying on the truth and accuracy of my answers to the questions in accepting my gift. I certify that each of the answers is true, accurate and complete to the best of my knowledge.

Signature            Date

Signature            Date

Questions?

Email our team at thriventcharitable@thrivent.com or call 800-365-4172.

Please send this document and any supporting documents by mail or fax:

Thrivent Charitable Impact & Investing
PO Box 8072
Appleton, WI  54912-8072
Fax: 612-844-4109