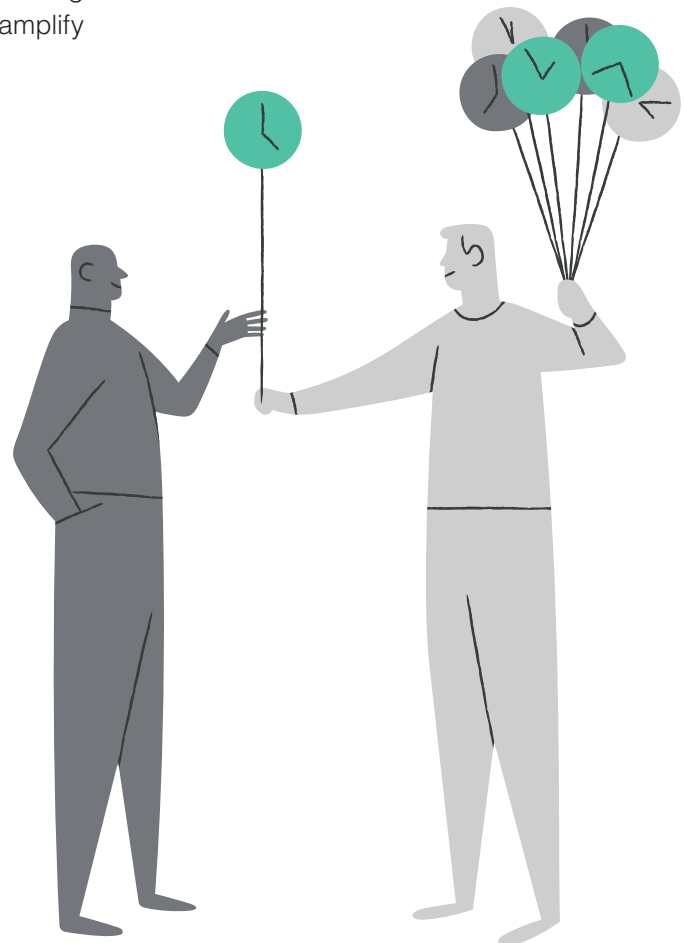


# Create your charitable fund

## Designated fund workbook

A Designated fund gives you the freedom to set up automatic annual grants to charities and causes that matter most to you.

You may choose how your fund's charitable assets are invested for long-term growth from a suite of Thrivent Charitable Impact & Investing® (Thrivent Charitable) portfolios. Your investment earnings are reinvested to grow your charitable fund allowing you to amplify your generosity.



If you are interested in an Advise-As-You-Go fund, where you can make a grant at a time of your choosing, instead of a Designated fund which is distributed annually, please visit [thriventcharitable.com/giving/create-fund](https://thriventcharitable.com/giving/create-fund).

# A giving solution tailored to your needs

We're committed to helping you live a life of meaning and gratitude by providing flexible and effective charitable solutions. To create your customized charitable fund and achieve your charitable goals, follow these simple steps. For additional information, please feel free to contact us at [thriventcharitable@thrivent.com](mailto:thriventcharitable@thrivent.com) or call 800-365-4172.

## Step 1: About you

### First donor

Full name  Mr.  Ms.  Mrs.  Miss  Other \_\_\_\_\_

\_\_\_\_\_  
Date of birth \_\_\_\_\_

### First donor's primary address

Street \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Primary phone \_\_\_\_\_

Alt. phone \_\_\_\_\_

Business phone \_\_\_\_\_

Email address \_\_\_\_\_

Preferred method of communication (select one)

Primary phone  Alt. phone  Business phone  Email

### Faith affiliation (optional)

Denomination/faith tradition \_\_\_\_\_

### Alternate address (if applicable)

Street \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Primary phone \_\_\_\_\_

Business phone \_\_\_\_\_

Email address \_\_\_\_\_

Dates for alternate address: From \_\_\_\_\_ to \_\_\_\_\_

### 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.

### Additional donor (if applicable)

Full name  Mr.  Ms.  Mrs.  Miss  Other \_\_\_\_\_

\_\_\_\_\_  
Relationship to first donor: spouse, child, friend, etc.  
\_\_\_\_\_

Date of birth \_\_\_\_\_

### Additional donor's primary address

Street \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Primary phone \_\_\_\_\_

Alt. phone \_\_\_\_\_

Business phone \_\_\_\_\_

Email address \_\_\_\_\_

Preferred method of communication (select one)

Primary phone  Alt. phone  Business phone  Email

### Faith affiliation (optional)

Denomination/faith tradition \_\_\_\_\_

## Step 2: Authorize access

List all the people authorized to discuss your gift with Thrivent Charitable Impact & Investing® staff. This list may include family members, friends or professional advisors (financial advisor, CPA, attorney, etc.).

Name	Relationship to donors	Phone/email
_____	_____	_____
_____	_____	_____
_____	_____	_____

## Step 3: Your Designated fund

### Name your fund

Create a fund in your name or a name that suits your fund's purpose (e.g., The John and Mary Jones Fund).

**Fund name:** \_\_\_\_\_

### Select your type of Designated Fund

- Designated donor-advised fund:** A Designated fund gives you the option to provide support to organizations annually, 5% in perpetuity, or grant 10% for 10, 15 or 20 years. A Designated fund can be active in your lifetime or deferred until your passing. Additionally, with a Designated donor-advised fund, you may make changes even after the fund is established.
- Designated non-advised fund:** A non-advised fund is established with a gift of qualified charitable distributions (QCDs) from an IRA. Because QCDs cannot be gifted to a donor-advised fund, donors choose the non-advised fund option. Additionally, a Designated non-advised fund does not allow for changes once the fund is established.

### 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.

## Step 4: Your gift

Approximate value	Additional details
-------------------	--------------------

Asset details, e.g., cost basis for securities or real estate, qualified charitable distributions

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### Give Now

Outright gifts that provide immediate charitable support (not a trust, gift annuity or life insurance).

- |   |          |       |
|---|----------|-------|
| <input type="radio"/> <b>Cash</b>   | \$ _____ | _____ |
| <input type="radio"/> <b>Securities</b><br>Attach a copy of brokerage statement with shares identified.   | \$ _____ | _____ |
| <input type="radio"/> <b>Real estate</b><br>Contact us for a Real Estate Questionnaire.   | \$ _____ | _____ |
| <input type="radio"/> <b>Qualified IRA distributions</b> to a charitable fund without ongoing advisory privileges.<br>Name your fund at the top of page 5 and complete section A.                           | \$ _____ | _____ |
| <input type="radio"/> <b>Complex assets</b> (Crops/farm equipment, closely held stock [C-Corp or S-Corp], limited liability company, limited partnership).<br>Contact us for a Complex Asset Questionnaire. | \$ _____ | _____ |

### 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.

**Approximate value**   **Additional details**

Asset details, e.g., cost basis for securities or real estate, qualified charitable distributions

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**Give Later**

Gifts that occur upon death and provide future charitable support.

- Bequest** through a will or living trust. \$ \_\_\_\_\_  
Contact us for suggested language for will.
  
- Beneficiary proceeds** from IRA or other qualified retirement plan, annuity or life insurance. \$ \_\_\_\_\_  
Contact us for suggested beneficiary language.
  
- Beneficiary of non-Thrivent trust.** \$ \_\_\_\_\_  
Contact us for suggested language for trust agreement.
  
- Life insurance** to be owned by Thrivent Charitable Impact & Investing. \$ \_\_\_\_\_  
Please attach a copy of an in-force insurance illustration.
  
- Life insurance** using qualified IRA distributions. \$ \_\_\_\_\_  
Name your fund on page 5 and complete section A.
  
- Life estate reserved.** \$ \_\_\_\_\_  
Contact us for a Real Estate Questionnaire.

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**Give & Receive**

Gifts that provide ongoing income payments and future charitable support.

- Charitable gift annuity.** \$ \_\_\_\_\_  
Contact us for a Gift Annuity Application.
  
- Charitable remainder trust with Thrivent Charitable: Contact us for a Charitable Remainder Trust Application.
  
- Charitable remainder annuity trust.** \$ \_\_\_\_\_
  
- Charitable remainder unitrust.** \$ \_\_\_\_\_
  
- Testamentary charitable remainder trust.** \$ \_\_\_\_\_

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**Total gift \$ \_\_\_\_\_**

## Options for charitable support

Select A, B and/or C.

### A. Designate charities for automatic annual grants

Fund minimum: \$5,000 per charity.\*

Charity name _____	Charity name _____
% of distribution _____	% of distribution _____
Street _____	Street _____
City/State/ZIP _____	City/State/ZIP _____
Phone number _____	Phone number _____
Grant purpose (optional) _____	Grant purpose (optional) _____
Charity name _____	Charity name _____
% of distribution _____	% of distribution _____
Street _____	Street _____
City/State/ZIP _____	City/State/ZIP _____
Phone number _____	Phone number _____
Grant purpose (optional) _____	Grant purpose (optional) _____

### Thrivent Charitable giving options

- ELCA Impact Fund ..... \_\_\_\_\_%
- Ecumenical & Interfaith Impact Fund ..... \_\_\_\_\_%
- Education Impact Fund ..... \_\_\_\_\_%
- Disaster Response and Resiliency ..... \_\_\_\_\_%
- Health Impact Fund ..... \_\_\_\_\_%
- Human Services Impact Fund ..... \_\_\_\_\_%
- LCMS Impact Fund ..... \_\_\_\_\_%
- Thrivent Charitable Impact & Investing Community Impact Fund .. \_\_\_\_\_%
- WELS Impact Fund ..... \_\_\_\_\_%

\*Administrative fees apply upon receipt of gift assets.

### 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.

**○ B. Designate a scholarship**

Provide annual scholarships through an accredited educational institution. Fund minimum: \$5,000 per educational institution.\* Additional scholarship policies and guidelines available upon request.

Accredited educational institution through which the scholarship will be distributed:

Name \_\_\_\_\_

Phone number \_\_\_\_\_

Address/City/State/ZIP \_\_\_\_\_

\_\_\_\_\_

Recommended scholarship criteria (e.g., GPA, field of study, financial need).

\_\_\_\_\_

**○ C. Designate a cause/area of interest**

Fund minimum: \$25,000 for each designated cause or area of interest.\*

Designate your specific cause or area of interest, describing your scope and criteria in as much detail as possible (e.g., sample organizations, geographic area, faith affiliation). Thrivent Charitable researches specific charities to address your designated cause.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*Administrative fees apply upon receipt of gift assets.

**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.

**Investment selection**

I recommend that my fund’s assets be invested as follows:

If no box is checked, assets will be invested in the Mission Growth Portfolio. The exception is charitable gift annuity assets, which are invested in the Core Growth Portfolio.

- Core Growth Portfolio (75% Equities/10% Diversifiers/15% Fixed Income/Cash)
- Mission Growth Portfolio (70% Equities/10% Diversifiers/15% Fixed Income/Cash)
- WomenInvest Portfolio (75% equities/25% fixed income)

**Grant distribution preferences**

Make your selection for annual grant distributions from the options below.

- Perpetual grant support: 5% distributed annually among recommended charities. Distribution rate is subject to change.
- Term of years grant support: 10% distributed annually for 10 to 20 years. At the end of the set term, the fund remainder is distributed to recommended charities. Check one box to indicate the term of years:  10 years  15 years  20 years.

**Optional**

- I/we request an immediate one-time grant of a specific amount to a specific charity(ies). I/we understand that \$50,000 or 20% of the gift, whichever is greater, must remain in the fund for ongoing grant distributions.

Charity name \_\_\_\_\_

Gift amount \$ \_\_\_\_\_

Street \_\_\_\_\_

\_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Phone number \_\_\_\_\_

Grant purpose (optional) \_\_\_\_\_

**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.



## Step 5: Additional instructions

### Acknowledgment

Grants to charities are accompanied by a grant letter that includes optional information as selected below. Please check only **one** box to indicate who should be acknowledged for the grant during your lifetime and one box to indicate who should be acknowledge upon your passing. Select the first option (Fund name, donor name(s) and address) if you would like the grantee organization to thank you directly. The donor name(s) will consist of the primary fund advisor(s) listed on the charitable fund account, unless you direct us otherwise.

#### During your lifetime

- Fund name, donor name(s) and address
- Fund name and donor name(s)
- Fund name only
- Anonymous

#### Upon your passing

- Fund name and donor name(s)
- Fund name only
- Anonymous

Comments or special instructions for your fund:

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## Step 6: Gift acknowledgment

I acknowledge that I intend to make an irrevocable gift to Thrivent Charitable Impact & Investing as described in this workbook. With my gift, I understand that I will be transferring all ownership and legal control of the gift to Thrivent Charitable Impact & Investing, subject to acceptance by an officer of Thrivent Charitable, for allocation to a donor-advised fund or charitable fund.

I reviewed and accept Thrivent Charitable Impact & Investing's statement of policies as stated in About Your Charitable Fund (available online at [thriventcharitable.com](http://thriventcharitable.com)) and understand my fund will be administered according to these policies.

---

Donor signature

Date

---

Donor signature

Date

### 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.

### **Gift representation of your assets**

Thrivent Charitable does not wish to accept gifts that may cause undue hardship to donors' personal welfare or comfort during their lifetime. To ensure the gift you are making is appropriate for your situation, please indicate what portion of your estate or assets this gift represents. With gifts of life insurance, check the box that best reflects the portion used for premium payments.

- Less than 10% of my assets.
- Between 10% and 24% of my assets.
- Between 25% and 49% of my assets.

### **Send your fund workbook**

#### **Once your fund workbook is completed, please send it to:**

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

#### **If you have questions:**

Phone: 800-365-4172  
Email: [thriventcharitable@thrivent.com](mailto:thriventcharitable@thrivent.com)

Upon receipt of your completed fund workbook, Thrivent Charitable will establish your fund and send a confirmation along with information on how to access your fund and begin making grants.

#### **Go paperless with e-statements**

Once your donor-advised fund is established, you can sign up for electronic delivery of statements at [thriventcharitable.com](http://thriventcharitable.com).

### **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.

## Financial advisor information

To be completed by the donor's financial advisor when he or she is part of the gift process. The financial advisor agrees to abide by the Gift Advocate Code of Ethics available online at [thriventcharitable.com](http://thriventcharitable.com).

Financial advisor's name \_\_\_\_\_

Regional Advisor Group  
(for Thrivent financial advisors only) \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_

Notes or special instructions \_\_\_\_\_

\_\_\_\_\_

### **Additional financial advisor assisting with gift** (if applicable)

Financial advisor's name \_\_\_\_\_

Regional Advisor Group  
(for Thrivent financial advisors only) \_\_\_\_\_

Address \_\_\_\_\_

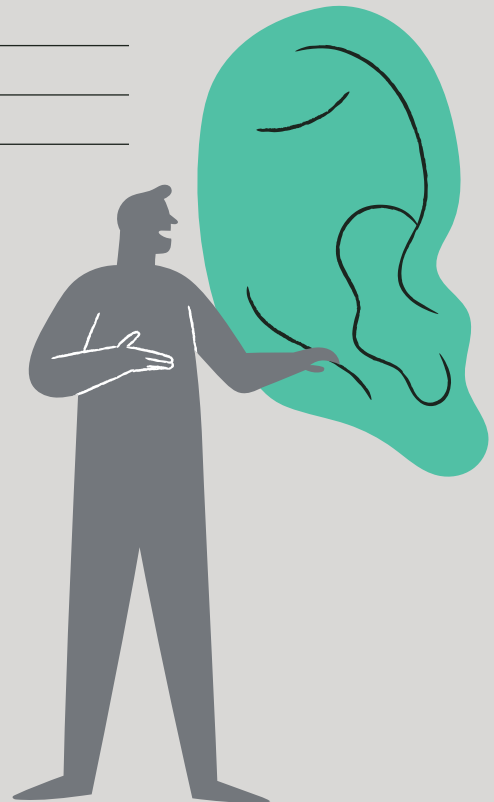
\_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_

Notes or special instructions \_\_\_\_\_

\_\_\_\_\_



### **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.

# 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 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.



Thrivent Charitable Impact & Investing® 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 advisors. It is a separate legal entity from Thrivent, the marketing name for Thrivent Financial for Lutherans.

Insurance products, securities and investment advisory services are provided by appropriately appointed and licensed financial advisors and professionals. Only individuals who are financial advisors are credentialed to provide investment advisory services. Visit [Thrivent.com](https://www.thrivent.com) or FINRA's Broker Check for more information about Thrivent's financial advisors.

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