

Investing in Good

March 2023

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What's your 2023 QCD plan?

As you plan to manage your income for the year, be sure to consider how to incorporate qualified charitable distributions (QCDs). A QCD is the direct transfer of assets from your IRA, payable to a qualifying charity, such as Thrivent Charitable. Donors age 70½ and older can transfer up to \$100,000—now indexed for inflation—annually from IRAs to qualifying charities. The amount transferred can be used to meet required minimum distributions (RMDs) and has potential tax advantages.

Using your QCDs, you can create a non-advised charitable fund with automatic annual grants, make a gift of life insurance or create lifetime income and benefit charity with a charitable gift annuity.

To learn more about QCDs, [visit our website](#), contact your financial advisor or [contact our team](#).

Maximize your donations with a charitable giving plan

There seems to be a never-ending stream of calls, emails and letters asking for donations. With so many requests, it can be overwhelming deciding who or what to support and how much to give.

The solution? Reconsider your approach to charitable giving. If you build charitable giving into your financial plan, you benefit in several ways. You have the satisfaction of knowing you've thoughtfully chosen who and where you want to help. You have a plan in place to make generosity happen. You may be able to give more, and you might even gain some tax advantages.

As a Thrivent Charitable Impact & Investing® donor, it may be worth reviewing the following steps to see if there are additional ways to maximize your giving:

- Develop clear goals for your charitable giving along with a strategy to fit your donations into your financial plan.
- Understand the ways you can give—now, later or give and receive.
- Familiarize yourself with tax deduction limits and how they may affect your contributions each year.
- Explore charitable giving tax strategies, including donating cash, setting up a donor-advised fund, and making a qualified charitable distribution (QCD).
- Consider other ways to be generous, such as gifting appreciated assets, leaving assets to charity in your will, setting up a charitable gift annuity and establishing a charitable trust.

You can do more for your favorite organizations and causes when you understand the rules and develop a well-considered strategy. When you build giving into your financial strategy, you benefit in multiple ways: Your giving is assured, and you provide for your family in a tax-efficient way.

To incorporate charitable giving strategies into your financial goals, connect with your financial advisor or [our team](#) today.


Read more on these tips [here](#).



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Your giving resources

Thrivent Charitable offers resources to help you make the most of your giving—now and into the future. As you plan financially for 2023, what is your giving vision for the year and beyond?

Here are two resources to help you plan:

- [Your Giving Plan Booklet: Set your course](#)
- [Questions to jumpstart your giving](#)

Now sending via email ...

Thrivent Charitable now electronically sends statements, gift receipts, newsletters and event invitations to provide you with timely information about your charitable fund, help you make informed giving decisions, and to be a good steward of the environment.

Donors with active funds will receive a notice when their charitable fund statements are ready via email, and can access them through [your Fund Dashboard](#). For guidance on using your Fund Dashboard to access statements, download the Fund Dashboard reference guide at bit.ly/TCRefGuide or [contact us](#).

Your feedback helps us serve you

Thank you for trusting Thrivent Charitable to help you make the most of all you've been given. To better serve you and your charitable interests, we have asked Leede Research, an independent marketing research firm, to survey you on our behalf. Please watch your email for your personal invite link and take 10 minutes to complete the questionnaire. Your input helps ensure our team is providing the services you need to support your favorite charities and causes now and into the future.

You're invited

How do you engage your family in giving? Join Thrivent Charitable and MiaLisa Millares, executive director of Doing Good Together™, for a webinar March 30 at 12 p.m. CST to help you weave kindness practices and philanthropic tools into your life and your family.

During the 45-minute webinar you will:

- Reflect on your own experiences with philanthropy.
- Learn ways to inspire and engage young people in your life through generosity.
- Emerge with newfound energy around giving back to the community.
- Get tips on including your entire family in your charitable planning.

[Register to attend today!](#)

No products will be sold or gifts solicited.

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 or FINRA's BrokerCheck for more information about Thrivent's financial advisors.