

## Steps to create an **Advise-As-You-Go** charitable fund



### 01. Choose your giving strategy:

- Give now.
- Give later.
- Give & receive.



04. Review and save your welcome email from Thrivent Charitable. It includes tools and resources for making the most of your charitable giving.



02. Create your fund. Fill out and complete an online fund form.



05. Make an initial gift to your fund (depending on the type of asset) or update your giving intentions.



03. Review the fund overview you receive via email, to ensure we have an accurate record of your choices.



You now have a planned giving strategy to make a positive impact today and into the future.

Make grants to the organizations and causes you cherish at a time of your choosing.

For additional support as you create your charitable fund, contact your Thrivent financial advisor or connect with our team at 800-365-4172 or by visiting [thriventcharitable.com](https://thriventcharitable.com).

Thrivent Charitable™, the marketing name for 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 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://Thrivent.com) or FINRA's BrokerCheck for more information about Thrivent's financial advisors.