

Steps to create a designated charitable fund



01. Choose your giving strategy:

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



05. Review, sign and return the fund agreement electronically or by mail.



02. Consider your fund options:

- Designated fund.
- Cause or area of interest fund.
- Scholarship fund.
- Non-advised fund.



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



03. Create your fund.



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



04. Receive a draft fund agreement from us.



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

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.

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