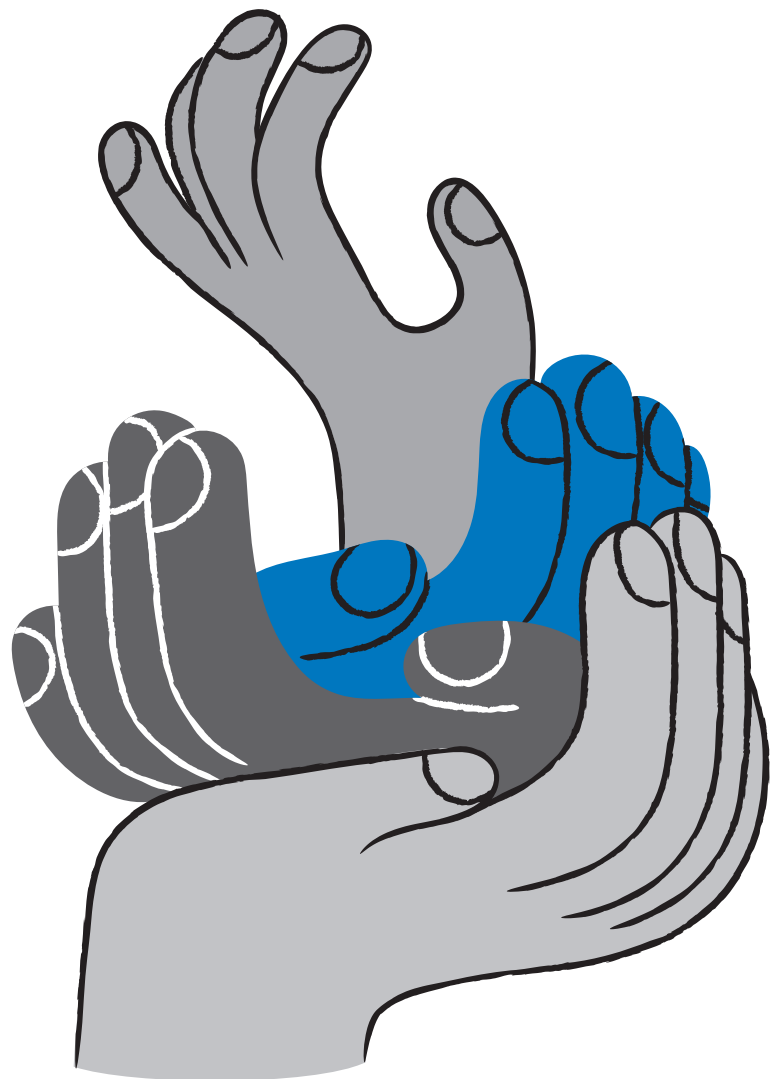


Create your endowment fund

Endowment fund workbook



Endowment fund workbook

Any church or nonprofit organization can create a flexible fund to grow a permanent source of support for the future. If you have questions about creating your endowment fund at Thrivent Charitable Impact & Investing® (Thrivent Charitable), email thriventcharitable@thrivent.com or call 800-365-4172.

Your organization/church

Organization name _____

Faith affiliation (if applicable) _____

Organization's tax ID number _____

Date of incorporation _____

State of incorporation _____

Organization address _____

City/State/ZIP _____

Phone _____

Email _____

Fax _____

Name of clergy/executive director

Mr. Ms. Mrs. Miss Rev. Other _____

Your endowment fund

Fund name _____

Fund purpose Endowment
 Other—please describe

Initial gift amount \$ _____

Notes: _____

The minimum initial gift is \$25,000. Additional gifts of \$1,000 or more are welcome at any time.

Investment selection

Please choose one or more of the offerings below by placing the percentage of your assets you'd like invested on the line next to the corresponding offering. Once the total percentage equals 100, your work is complete. If no selection is made, assets will be invested in the Thrivent Charitable Impact Fund™.

Thrivent Charitable Impact Fund™

(Actively managed)

_____ Thrivent Charitable Impact Fund™
(80% equities/20% fixed income)

For donors seeking a competitive financial return alongside positive social and environmental impacts over the long term.

Index Portfolio

(Passively managed)

_____ Vanguard LifeStrategy Growth Fund
(80% equities/20% fixed income)

For donors with a long-term investment time horizon of seven years or more and a moderately high risk tolerance.

_____ Vanguard LifeStrategy Moderate
Growth Fund
(60% equities/40% fixed income)

For donors with a long-term investment time horizon of five years or more and a moderate risk tolerance.

_____ Vanguard LifeStrategy Income Fund
(20% equity/80% fixed income)

For donors with a medium- to long-term investment time horizon of three years or more and a moderately conservative risk tolerance.

Money Market

_____ Vanguard Federal Money Market Fund
(100% cash)

For donors with a short-term investment time horizon and a conservative risk tolerance.

Thrivent Portfolio

(Actively managed)

_____ Thrivent Moderately Aggressive
Allocation Fund
(80% equities/20% fixed income)

For donors with a long-term investment time horizon of seven years or more and a moderately high risk tolerance.

_____ Thrivent Moderate Allocation Fund
(65% equities/35% fixed income)

For donors with a long-term investment time horizon of five years or more and a moderate risk tolerance.

_____ Thrivent Income Fund
(100% fixed income)

For donors with a medium- to long-term investment time horizon of three years or more and a moderately conservative risk tolerance.

Advisor-Managed Fund

_____ Advisor-Managed Fund

For customized portfolios of **\$250,000 or more**.

Total % _____

The total must equal 100%.

Your fund's advisor

Please provide both name and title as it pertains to the fund (e.g., John Doe, Endowment Committee Chair).

Name of fund advisor _____

Title _____

Preferred phone _____

Home Cell Business

Email _____

Person who will have read-only access to your fund

(e.g., Office administrator)

Name of person _____

Title _____

Preferred phone _____

Home Cell Business

Email _____

Contingent charitable beneficiary

Please indicate how your fund is to be directed should you lose your tax-exempt status or are no longer a viable organization. If no box is checked, Thrivent Charitable assumes your recommendation *would benefit the Thrivent Charitable Community Fund*. To learn more about our collaborative funds, visit thriventcharitable.com/collabfunds.

Thrivent Charitable Community Fund

One or more collaborative fund(s):

Disaster Response & Resiliency

ELCA

Education

LCMS

Health & Human Services

WELS

Ecumenical & Interfaith

Other _____

Additional notes _____

Financial advisor information

This section is to be completed by the organization's financial advisor, when a financial advisor is part of the gift process. The financial advisor must review the [Gift Advocate Code of Ethics](#). Once this workbook is received by Thrivent Charitable, a Fund Agreement is prepared for the signature authorized by the organization. The Fund Agreement is sent to the organization's fund advisor and the financial advisor is copied.

Financial advisor's name _____

Thrivent Advisor Group (for Thrivent financial advisors only) _____

Street _____

City/State/ZIP _____

Phone _____

Fax _____

Email address _____

Notes or special instructions _____

Additional financial advisor assisting with gift (if applicable)

Financial advisor's name _____

Thrivent Advisor Group (for Thrivent financial advisors only) _____

Street _____

City/State/ZIP _____

Phone _____

Fax _____

Email address _____

Notes or special instructions _____

Send your fund workbook

Once you complete your fund workbook, please mail it or securely upload it to:

Thrivent Charitable Impact & Investing

PO Box 8072

Appleton, WI 54912-8072

Online: thriventcharitable.com/share-files

If you have questions:

Phone: 800-365-4172

Email: thriventcharitable@thrivent.com

Fax: 612-844-4109

Web: thriventcharitable.com

Thrivent Charitable will establish your fund and send a confirmation along with information on how to access your fund and begin making grants.

About us

Thrivent Charitable Impact & Investing® brings hope to the world by empowering people to create the change that matters most to them. We open the joy of generosity to all by making it easy for anyone to give to the causes they cherish. We take a holistic, personalized approach to help our donors create strategic charitable plans, illuminating new paths to personalized impact through visionary models, tailored service and deep expertise. Ignited by our faith, we are passionate about 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 BrokerCheck for more information about Thrivent's financial advisors.

To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice contained in this brochure is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing or recommending to another party to any transaction or matter addressed herein.

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