

Advisor managed funds checklist*

Thrivent Charitable paperwork

- √ When you complete the online fund form, make sure to select “I would like the named financial advisor to recommend how my fund's assets be invested (Advisor Managed Fund)” under *How would you like to invest your fund's assets?*
- √ Complete the Advisor Managed Fund Supplemental Fund Application and submit it to our team.

Brokerage/TIMI account paperwork

- √ The financial advisor reviews and confirms an understanding of our program policies and guidelines.
- √ We will provide a sample brokerage account application to the financial advisor with Thrivent Charitable Impact & Investing listed as the client. Any reference to the account owner and name should be: "Thrivent Charitable Impact & Investing FBO – Charitable Fund Name."
- √ We will also provide Articles of Incorporation and Corporate Resolution documentation.
- √ The financial advisor completes and submits the brokerage application.
- √ The financial advisor also provides Investment Overview, SIS and Client Agreement paperwork for review and signatures by Thrivent Charitable. The financial advisor submits the paperwork.
- √ The financial advisor links the brokerage account to their investment profile. The account will be registered to our Tax ID, 41-1802412.
- √ The financial advisor notifies our team once the account is established and provides the account number so we can link it to our other accounts.

Making a gift

- √ Send gifts to Thrivent Charitable Impact & Investing.
- √ A gift receipt is generated and sent to your client(s) for tax purposes. Proceeds are wired to the newly established brokerage account.

**Note: Only Give Now gifts are eligible for advisor managed funds.*

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.

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