

PO Box 8072
Appleton, WI 54912-8072
800-365-4172 • thriventcharitable.com

Charitable remainder trust application

A charitable remainder trust offers an opportunity to make a charitable gift and receive ongoing regular payments in return. To establish a charitable remainder trust with Thrivent Charitable Impact & Investing[®] serving as trustee, please complete this application and the **Fund Workbook**. If you have any questions, please contact a gift planner at giftplanner@thrivent.com or call 800-365-4172.

Donor name: _____
Donor name: _____

SSN: ____/____/____
SSN: ____/____/____

Type of charitable remainder trust

- Annuity Trust
- Unitrust
- Flip Unitrust

Term of trust

- Lifetime
- Term of ____ years (may not exceed 20)
- Lifetime + term of ____ years (may not exceed 20)

Income beneficiaries

Please include additional information about income beneficiaries on back of this form.

Desired payout rate: ____ %

Your gift

- Cash in the amount of \$_____
- Mutual fund assets (please provide additional information on the back of this form)
- Publicly traded securities (please provide additional information on the back of this form)
- Real estate with an approximate fair market value of \$_____ cost basis of \$_____ (for gifts of real estate to a flip unitrust, please contact Thrivent Charitable for more information and a Real Estate Questionnaire)
- Closely Held Stock/Other Complex Asset with an approximate fair market value of \$_____ cost basis of \$_____ (for gifts of complex assets to a flip unitrust, please contact Thrivent Charitable for more information and a Complex Asset Questionnaire)
- Crops/Equipment with an approximate fair market value of \$_____ cost basis of \$ _____
- Testamentary gift from my estate in the amount of \$_____

Note: The Trust pool is invested in the Vanguard LifeStrategy Growth Fund.

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Direct deposit of trust distributions

I/we request charitable remainder trust distributions be directly deposited to my/our bank/savings account.
Please attach a voided check from the account to which you wish your payments to be deposited.

To accept gifts of securities, the following information is needed:

Name of mutual fund or security	Number of shares	Owner	Date acquired	Original cost per share	Current fair market value
		<input type="checkbox"/> Donor <input type="checkbox"/> Spouse <input type="checkbox"/> Joint		\$	\$
		<input type="checkbox"/> Donor <input type="checkbox"/> Spouse <input type="checkbox"/> Joint		\$	\$
		<input type="checkbox"/> Donor <input type="checkbox"/> Spouse <input type="checkbox"/> Joint		\$	\$
		<input type="checkbox"/> Donor <input type="checkbox"/> Spouse <input type="checkbox"/> Joint		\$	\$

Important considerations for gifts of mutual funds or securities

If the securities you intend to give are worth less than you paid, you may want to consider selling the securities yourself and gifting the cash proceeds to Thrivent Charitable Impact & Investing. You may be entitled to take a loss on your tax return. In addition, a donor who gives cash can deduct up to 50% of their adjusted gross income in the year of the gift (with a five-year carry-over). (Donors giving long-term securities can deduct up to 30% of their adjusted gross income.)

Income beneficiaries (if other than donors)

Name	Relationship to Donor	Date of Birth	Address & Phone Number

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

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 Broker Check for more information about Thrivent's financial advisors.