

# Charity change

To change the charities recommended receiving support from your donor-advised fund, please complete this form and return it to our team. Please list all the charities you recommend to receive grant distributions from your fund, including the amount of the gift designated to each charity stated in percentages. Percentages will be rounded to the nearest full percentage, with all totaling 100%.

Please note: Only one charity per \$5,000 given can be named. Once this information is received, an addendum to your Fund Agreement will be drafted and returned for your review and signature. If your changes include more charities than space allows, you may make additional copies of this form.

## **Fund information**

Fund name: \_\_\_\_\_

Fund advisor name: \_\_\_\_\_

Fund advisor address: \_\_\_\_\_

City/state/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## **Charity recommendation: charity recipient(s)**

Charity name: \_\_\_\_\_

Address: \_\_\_\_\_

City/state/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gift amount (as a %): \_\_\_\_\_

Charity name: \_\_\_\_\_

Address: \_\_\_\_\_

City/state/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gift amount (as a %): \_\_\_\_\_

Charity name: \_\_\_\_\_

Address: \_\_\_\_\_

City/state/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gift amount (as a %): \_\_\_\_\_

### Charity recommendation: charity recipient(s)

Charity name: \_\_\_\_\_

Address: \_\_\_\_\_

City/state/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Gift amount (as a %): \_\_\_\_\_

### Charity recommendation: Impact funds

% Thrivent Charitable Community Impact Fund

% Disaster Response & Resiliency Impact Fund

% Education Impact Fund

% Health Services Impact Fund

% Human Services Impact Fund

% ELCA Impact Fund

% LCMS Impact Fund

% WELS Impact Fund

% Ecumenical & Interfaith Impact Fund

### Grant Instructions

Check one of the boxes below to change your grant distribution preference. If no box is checked, your current grant distribution preferences for your fund will remain in place.

Perpetual Grants: Distribute 5% of fund's value on an annual basis (% subject to change).

Term of Years Grants: Distribute 10% of fund's value annually for 10, 15, or 20 years.

10 years     15 years     20 years

Thrivent Charitable Impact & Investing<sup>®</sup> 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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## Disclosure of benefiting charities

Check one of the boxes below to change your disclosure preferences. If no box is checked, your current disclosure preferences for your fund will remain in place.

- Disclose gift to benefiting charities upon receipt of the signed Fund Addendum.
- Disclose gift to benefiting charities with the first grant distribution(s).
- Disclose to benefiting charities after death.
- Never disclose to benefiting charities.

Name (print): \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_ Date: \_\_\_\_\_

### Notes or special instructions:

Return completed form by mail, fax, or online secure upload to:

Thrivent Charitable Impact & Investing  
PO Box 8072  
Appleton, WI 54912-8072  
<https://www.thriventcharitable.com/share-files>

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