

# Complex asset gift questionnaire

First donor full name

\_\_\_\_\_

Second donor full name (if applicable)

\_\_\_\_\_

## Asset information

Full legal name of asset owner(s): \_\_\_\_\_

\_\_\_\_\_

Asset type (check all applicable types):

- Real estate (complete Thrivent Charitable's Real Estate Gift Questionnaire).
- Crops/farm equipment.
- C-Corp closely held stock.
- S-Corp closely held stock.
- Limited partnership.
- General partnership.
- Limited liability company.
- Other: \_\_\_\_\_

Type of business: \_\_\_\_\_

\_\_\_\_\_

Estimated value of donor's total ownership: \$ \_\_\_\_\_

How was this value determined? \_\_\_\_\_

\_\_\_\_\_

What portion of the asset is the donor giving? \_\_\_\_\_

\_\_\_\_\_

How long has this asset been owned by the donor? \_\_\_\_\_

\_\_\_\_\_

Donor's cost basis: \$ \_\_\_\_\_

How did the donor acquire this asset? \_\_\_\_\_

\_\_\_\_\_

Is there a deadline for completing this gift?

No

Yes, deadline: \_\_\_\_\_

Are there any potential buyers for this gift asset?

No

Yes (please describe): \_\_\_\_\_

\_\_\_\_\_

Is there any debt associated with this gift asset?

No

Yes (please describe): \_\_\_\_\_

\_\_\_\_\_

If the gift is corporate business interests, include the name and contact information of the business's CPA or CFO:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Next steps

Please include the following documents with this questionnaire.

### Real estate

Please complete Thrivent Charitable's Real Estate Gift Questionnaire.

#### Corporation

- Most recent corporate financial statement and Bylaws.
- Most recent federal tax return.
- Form 1120S and K-1 for S-Corporations.
- Form 1120 for C-Corporations.
- Articles of Incorporation.
- Bylaws.
- List of shareholders and number of shares owned.
- Valuation/appraisal (if available).
- Shareholder agreement and amendments.

#### Limited partnership

- Most recent financial statement.
- Most recent federal tax return (Form 1065 and K-1).
- Certificate of limited partnership formation.
- Partnership agreement with amendments.
- List of members and units, or percentage owned.
- Valuation/appraisal (if applicable).

#### Limited liability company

- Most recent financial statement.
- Most recent federal tax return (Form 1065 and K-1).
- Articles of Organization.
- Operating agreement with amendments.
- List of members and units, or percentage owned.
- Valuation/appraisal (if applicable).

By signing this document, I understand Thrivent Charitable Impact & Investing® is relying on the truth and accuracy of my answers to the questions in accepting my gift. I certify that each of the answers is true, accurate and complete to the best of my knowledge.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Questions?

Email our team at [thriventcharitable@thrivent.com](mailto:thriventcharitable@thrivent.com) or call 800-365-4172.

## Please send this document and any supporting documents by mail or fax:

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