

Your giving plan

Set your course

The things we hold dear—our faith, values and life experiences—motivate our giving.

That's why an intentional giving plan is so important. It allows you and future generations to spread the joy of generosity. It also provides Thrivent Charitable Impact & Investing[®] (Thrivent Charitable) with the insight needed to help you fill the world with hope, your way.



Getting started

Set aside time to give this process your full attention. This booklet prompts you to focus and clarify your giving plans and articulate your beliefs and desires.

Consider going through this process with your family or others who are involved in your giving plan. Thrivent Charitable staff can also assist you with this process to help tailor a giving plan incorporating your values and interests.

Step 1 Questions to jumpstart your giving (pages 3–4).

Step 2 Reflect on your journey (page 5).

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Step 8 Reflect on your giving plan (page 10).

The questions on the following pages are designed to guide you in creating a focused giving plan.

Your name(s): _____ Date: _____

Your donor-advised fund name: _____

Questions?

Thrivent Charitable's mission is to help you reach your giving goals. Contact us for assistance.

Email: thriventcharitable@thrivent.com

Phone: 800-365-4172

Questions to jump-start your giving

Think of this worksheet as a starting point—a scratch pad for approaching your giving through Thrivent Charitable. If you wish, invite family and friends to the discussion. Once completed, please send a copy to Thrivent Charitable for your donor-advised fund documents, so our team can better understand your giving goals and address your intentions.

Why you give. Imagine you're telling your friends or family why you give. What would you share with them?

Your passions. What are you passionate about? What opens your heart to joy?

Dream for tomorrow. If you could change one thing about how the world looks in the future, what would it be?

The needs around us. What current local, national or global issues and needs concern you the most?

Your guiding values. What values are important to you? Which do you want expressed through your giving?

Your faith. How does your faith influence your giving?

(continued)

Questions to jump-start your giving

(continued)

Where good work happens. Think of an organization you admire. What do you like about its work?

Get specific. How do you want your benefiting charity(ies) to use your gift? Do you want to support general operating expenses, address a specific need, or target a geographical area?

The big picture. Review your responses. What patterns do you see? What do your responses tell you about your motivation and focus for giving?



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Reflect on your journey

Some people find it easier to identify causes, interests or issues from a list.
Which of the following do you want to support or address the most? (Check all that apply.)

Arts, culture & humanities

- Arts education
- Dance
- Historic preservation
- Libraries
- Museums
- Music
- Theater
- TV, radio, film
- Other (please describe below)

Environmental issues

- Animal protection/
endangered species
- Natural resources/conservation
- Pollution/global warming
- Zoos/aquariums

Health issues & services

- Alcohol/substance abuse
- Health and spirituality
- Hospitals
- Medical research
- Specific diseases
(please describe below)

Faith-based programs & ministries

- Bible translation
- Building/facilities/
capital preservation
- Campus ministries
- Children and youth ministries
- Church administration
- Church body support
- Ecumenical efforts
- Faith-based nursing homes/
long-term care facilities
- Global ministries
- Lay ministry/lay leadership
- Maritime/armed services ministries
- Media ministries (TV, radio,
websites, etc.)
- Multicultural ministries
- My church
- Outdoor ministries (camps, etc.)
- Parish nurse programs
- Pastoral continuing education
- Prison ministries
- Senior ministries
- Worship

Education

- Colleges and universities
- Extension/adult learning
- K–12 schools
- Preschools
- Seminaries
- Scholarship(s)

Disaster relief

- International disaster relief
- U.S. disaster relief

Social issues & services

- Child care/early development
- Crime prevention
- Diversity, equity and inclusion
- Domestic violence/child abuse
- Economically disadvantaged
populations
- Employment/jobs
- Food/nutrition/hunger
- Homelessness/housing
- Immigrants/refugee services
- Legal services/legal aid
- Persons with disabilities
- Seniors/elderly
- Social justice
- Women's empowerment
- Other human services
(please describe below)

Other ideas

Did this list spark other ideas?
If so, list them here.

Act on your mission

Consider how you want your donor-advised fund to operate. The nuts and bolts of your giving plan help ensure achievement of your charitable goals.

1. If you'd like to support more than one organization or cause, share the percentage of your giving below:

Organizations you wish to support	Percentage of your giving
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %

2. Are you interested in funding a charity's general operating expenses?
 Yes
 No
3. Are you interested in capital support (such as building construction or renovations)?
 Yes
 No
4. Are you interested in supporting specific projects or programs of a charity or nonprofit?
 Yes
 No
5. Where do you wish to give?
 Locally
 Nationally
 Globally
6. Are you interested in providing:
 Ongoing support to charities?
 Making one-time gifts to charities?

Your giving would be best described as:

- One major grant each year.
- A few larger grants each year.
- Several smaller grants each year.
- A combination of large and small grants.

7. What information do you need to help you decide which organizations or projects to support?
- _____
- _____

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Share your charitable goals

Besides providing us with information about your charitable goals, there are likely others you will want to inform about your wishes, including family members and friends. Sharing your giving plan allows them to help you live out your desires and fosters a broader awareness for giving.

1. List people who should know about your giving plans.

2. Do you want the people listed involved in the decision-making process? If so, how?

3. If others are involved in the decision-making process, how will you incorporate their input? (Personal meetings are encouraged, although letters, emails or phone conversations may work for you.)

Contact us for help

Our team is here to help you make the most of your giving plans.
Contact us for help:

- Recommending new grants from your fund, checking the status of a grant request, or requesting that a grant be expedited.
- Creating or refining your giving goals.
- Updating your Fund Agreement with new beneficiaries, advisors or contingencies.
- Researching charities that match your charitable goals and values. (Also see suggested helpful tools below.)
- Following up with charities on how grant support was used.
- Discussing unique grant making scenarios (e.g., international grants).
- Scheduling a personal visit or phone review of your charitable fund.
- Connecting you to a gift planner to make additional gifts to your fund.

Contact us at 800-365-4172 or email thriventcharitable@thrivent.com.

Learn more about charities

Charity Navigator (charitynavigator.org)

Charity Navigator is America's leading evaluator of charities. Its rating system examines two broad areas of a charity's financial health—how responsibly it functions day-to-day and how well-positioned it is to sustain its programs over time. Each charity is awarded an overall rating of zero to four stars.

GuideStar (guidestar.org)

With free registration you can view information on the 1.8 million nonprofits listed with GuideStar. All are formally registered with the IRS or have proven they meet all IRS criteria for exempt organizations.

Charities Review Council (smartgivers.org)

Visit this website to take a closer look at charities before making your social investment.



Reflect on your giving plan

Your preferences for how, when and to whom you give may change over time. That's why it's important to intentionally take time every three to five years to review this document to determine whether the type, frequency and the recipients of your giving are in sync with your goals and values. And if you find your plan needs adjusting or a refresh, this enables you to make appropriate changes.

Specify a plan review date:

Be sure to add this date to your calendar on your laptop or mobile device.

Thank you!

Through this document, you articulated your values and wishes for your charitable giving. Your responses to questions also provide us with valuable insight so we can assist you with your giving. Once you have completed this booklet, send a copy to us via email or securely upload online to:

Thrivent Charitable Impact & Investing

P.O. Box 8072

Appleton, WI 54912-8072

Online: <https://www.thriventcharitable.com/share-files>

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 BrokerCheck for more information about Thrivent's financial advisors.



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.

