

Fund advisor change request

Please use this form to notify us of a change in the fund advisor. The fund advisor (typically, the church treasurer or the endowment committee chair) is the primary contact person for the endowment fund and the person from whom we accept requests and recommendations regarding the fund.

Fund advisor information

Fund name: _____

New fund advisor name: _____

Advisor's title or position (e.g., endowment chair, treasurer): _____

Fund advisor's preferred mailing address: _____

New fund advisor email: _____

New fund advisor phone: _____

Outgoing fund advisor (or another responsible party)

The outgoing fund advisor must sign this form. If that person is not available, the pastor, executive director or an individual in a position of leadership within the organization signs this form. The signer must be someone other than the incoming fund advisor.

Signed: _____ Date: _____

Printed name: _____

Title or position: _____

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

Fax: 612-844-4109

<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.

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