



Charitable

# 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  
PO Box 8072  
Appleton, WI 54912-8072  
Fax: 612-844-4109

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

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