



Charitable

# Grant recommendation for full balance

To recommend a grant for an endowment fund's balance, please complete and return this form. We are committed to acting promptly and, upon completion of our due diligence and approval, a grant check for the fund's full balance will be distributed to ensure it meets IRS standards. As per our policy, administrative fees will be assessed on a prorated basis based on the number of days assets were invested in the fund.

## Endowment fund information

Fund name: \_\_\_\_\_  
Fund number: \_\_\_\_\_  
Fund advisor name: \_\_\_\_\_  
Fund advisor address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## Statement of reason

As per our policy, a grant of the fund's full value must be accompanied by a statement of reason, certified as required by the Fund Advisor and one other person in a position of responsibility within the organization (e.g., pastor, church president/director, board chair).

Reason: \_\_\_\_\_  
\_\_\_\_\_

## Grant recommendation

As fund advisor, I recommend a grant for the full balance of the above-named fund. I certify the appropriate decision-making body within the organization has approved it. I also certify that this grant recommendation does not represent the payment of any pledge or financial obligation of the undersigned or the organization I represent. *To maintain a shell endowment fund at Thrivent Charitable, please check the box below:*

Maintain a shell fund on behalf of the above-named organization. I understand the fund will have a \$0 balance until such time as \$25,000 or more is raised and placed into the fund.

Fund Advisor Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_  
Second Signature/ Title: \_\_\_\_\_ Date: \_\_\_\_\_

## 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>

Thrivent Charitable™, the marketing name for 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 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](http://Thrivent.com) or FINRA's BrokerCheck for more information about Thrivent's financial advisors.