

# Which investment option is right for your charitable fund?

Explore investment choices for your Advise-As-You-Go charitable fund, giving circle or organizational endowment. You can choose from investment options designed to fit your individual investing preferences, time horizon and risk tolerance—all while aligning with your values and charitable goals. Answer the following questions to get started and learn which investment option is right for you.

Circle the responses that most apply to you:

**1. How do you react to significant market fluctuations in one year?**

- a. Ride it out. I'm in it for the long haul.
- b. I'll monitor the market and work with my financial advisor if adjustments are needed.
- c. It makes me nervous. I'll move my charitable investments to less volatile funds.
- d. I don't want to risk losing any money from my initial gift.

**2. When do you plan to grant the majority of the funds you're investing?**

- a. I won't grant the majority of my charitable fund for 7 or more years.
- b. I won't grant the majority of my charitable fund for 5 or more years.
- c. I won't grant the majority of my charitable fund for 3 or more years.
- d. I want to grant the majority of my charitable fund within the next 1-3 years.

**3. How important is it for your charitable investments to focus on companies that invest in supporting a low carbon economy, small businesses, sustainable agriculture or equitable access to health care?**

- a. Extremely important. I want my charitable fund to do more than just grow.
- b. Very important. I need balance across areas in which my charitable fund invests.
- c. Somewhat important. I know I'll be doing good through my grants, too.
- d. It's important, but right now that isn't my top charitable goal.



# Choices to help you reach your charitable goals

Here are your results based on your responses.

**If you picked mostly As, consider the following charitable investment options:**

- Thrivent Charitable Impact Fund™
- Thrivent Moderately Aggressive Allocation Fund
- Vanguard LifeStrategy Growth Fund

**If you picked mostly Bs, consider the following charitable investment options:**

- Thrivent Moderate Allocation Fund
- Vanguard LifeStrategy Moderate Growth Fund

**If you mostly picked Cs or Ds, consider the following charitable investment options:**

- Thrivent Income Fund
- Vanguard LifeStrategy Income Fund
- Vanguard Federal Money Market Fund

## Continue to explore your investment choices

The journey to achieving your charitable goals begins today. Talk to your Thrivent financial advisor, visit [thriventcharitable.com/charitableinvestments](https://thriventcharitable.com/charitableinvestments) to see detailed fund information, or call 800-365-4172 to get started.



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While diversification can help reduce market risk, it does not eliminate it. Diversification does not ensure a profit or protect against loss in a declining market. Investing involves risks, including the possible loss of principal.

Performance results will include Thrivent Charitable administrative fees and may differ from the results of the underlying fund.