DonorView – Trusts and Gift Annuities
Quick Guide

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3. Trusts & Gift Annuities Fund Overview
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Questions? Call InFaith at (800) 365-4172
LOG IN TO YOUR FUND DASHBOARD

Please log in to our secure site to view and manage your fund, or apply for grants and scholarships. We welcome you to contact us with questions, concerns, comments or for help with online access. For questions about scholarship and grant applications, please email us.

UPDATES:
Daily fund values on your fund dashboard are estimates based on investment performance as it becomes available. An accurate fair-market value of your fund is available 10-15 business days following month-end and can be accessed here through the PDF version of your statement.

NEWS
Stay up to date with InFaith news and giving resources. Visit Donor News at inFaithFound.org for resources on how to engage your family in giving, how to make additional gifts and how to help ensure all have access to clean water through InFaith's Creation Care Initiative. If you have an endowment fund at InFaith, visit Endowment News.

<table>
<thead>
<tr>
<th>LOGIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
</tr>
<tr>
<td>Enter Username</td>
</tr>
<tr>
<td>Password</td>
</tr>
<tr>
<td>LOGIN</td>
</tr>
<tr>
<td>Forgot Password</td>
</tr>
</tbody>
</table>

Password Requirements:
• Between 6-10 characters
• Includes at least 2 letters
• Includes at least 2 numbers

Hint!
If you can't remember your 'User name' or 'Password' use the link here.
FIRST-TIME LOG IN INSTRUCTIONS

Following your first login, you will be prompted to enter any missing information; Date of Birth, Email, etc.

As well as a Challenge question to be used in case you need to reset your password

Hint: Answers are Case Sensitive and spaces will be remembered, so be mindful how you spell your answer
TRUSTS & GIFT ANNUITIES FUND OVERVIEW

Click to switch between different Trusts or Gift Annuities

Click 'Trusts & Gift Annuities' then one of the sub-menus to navigate to other pages

ACCOUNT BALANCE

S111,846.35 (market value)

STATEMENT

Open Last Statement (In Acrobat)  See All Fund Activity and Statements

TOTAL CONTRIBUTIONS

$99,545.52 (as of 4/30/2018)

No additions have been made to this account in the past 30 day(s).

RECENT/UPCOMING DISTRIBUTIONS

No records found  See All Distributions

This page contains a summary of Account Balance, the last Fund Statement, Contributions and Distributions

YOUR FINANCIAL REP:

Michelle  michelle@thrivent.com

Use the links to the left or the menu items above to view pages with more detail on any of these topics
## Contribution History

### Account Selector

Select the Charitable Remainder Unitrust Account ID.

### Search

**Range**
- Last Year
- Advanced Search

Click 'Advanced Search' for a precise date range.

### Contribution History

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>Status</th>
<th>Account</th>
<th>Organization</th>
<th>Type</th>
<th>Payment Type</th>
<th>Payment Amount</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>073302</td>
<td>Received</td>
<td>The [Account ID] Charitable Remainder Unitrust</td>
<td>Allison, Glen J.</td>
<td>security contribution</td>
<td></td>
<td>$28,132.05</td>
<td>05/19/2010</td>
</tr>
<tr>
<td>073301</td>
<td>Received</td>
<td>The [Account ID] Charitable Remainder Unitrust</td>
<td>Allison, Glen J.</td>
<td>security contribution</td>
<td></td>
<td>$71,392.80</td>
<td>05/19/2010</td>
</tr>
</tbody>
</table>

**Export List**

Clicking the 'Export to Pdf' or 'Export to Excel' links will cause the 'Details' information to be exported to a file that can be saved on your computer.

Details of Contributions to your Fund for the selected time period.
**DISTRIBUTION HISTORY**

**ACCOUNT SELECTOR**

The Charitable Remainder Unitrust Acct. ID

**SEARCH**

- **Range**
  - Last 30 Days
  - Advanced Search

Click here to change the time range that activity is shown; Last 30, 60, 90 days, 6 months, or last year

Click ‘Advanced Search’ for a precise date range

**DISTRIBUTION HISTORY**

This table may include upcoming payments that reflect the date a payment is entered. Payments may be entered well in advance of their scheduled distribution date.

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>Status</th>
<th>Account</th>
<th>Type</th>
<th>Description</th>
<th>Payment Type</th>
<th>Payment Amount</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>877821</td>
<td>Posted</td>
<td>The Charitable Remainder Unitrust</td>
<td>CRUT Payment</td>
<td>Cash</td>
<td>EFT</td>
<td>$803.05</td>
<td>3/28/2017</td>
</tr>
<tr>
<td>877820</td>
<td>Posted</td>
<td>The Charitable Remainder Unitrust</td>
<td>CRUT Payment</td>
<td>Cash</td>
<td>EFT</td>
<td>$803.05</td>
<td>3/28/2017</td>
</tr>
</tbody>
</table>

Details of Distributions from your Fund for the selected time period
FUND ACTIVITY

ACCOUNT SELECTOR

The Charitable Remainder Unitrust Acct. ID

SEARCH

Range: Last 30 Days

FUND ACTIVITY REPORT

- Beginning Balance: $107,081.05
- Total Period Contributions: $0.00
- Total Period Distributions: $(1,606.10)
- Earnings Allocated to Account: $0.00
- Administrative Fee: $(250.00)
- Other Activity: $0.00
- Change in Value of Investments: $1,289.32
- Ending Balance: $107,514.27

FUND ACTIVITY DETAILS

ENDING BALANCE: FROM 3/11/2017 TO 4/10/2017

<table>
<thead>
<tr>
<th>Description</th>
<th>Qty</th>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trust Portfolio</td>
<td>984</td>
<td>$109.16</td>
<td>$107,514.27</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>$107,514.27</td>
</tr>
</tbody>
</table>

Click to switch between different Trusts or Gift Annuities

Click here to view Statements by Month, Quarter or Year

If you click on the Topics in blue text and underlined, more detail will appear here

Export to Pdf
Export to Excel
This page shows the Donor Advised Fund that will receive the remainder of the Trust or Gift Annuity once the term of the Trust or Gift Annuity is complete.

Contact InFaith by phone (800) 365-4172 to make changes to existing relationships.

The individuals who currently have a relationship to this Fund and their Access Level.
Fund Documents

Here you will find other documents related to your fund;
Your original Fund Agreement and Tax Packet

ACCOUNT

The [Charitable Remainder Unitrust Acct. ID]

FUND DOCUMENTS

File Name

Tax Packet.pdf

CRT 2016.pdf

*Note*
Monthly and Quarterly Statements are found on the 'Fund Activity' page
This page contains information pertaining to you, the person logged into DonorView. You can make changes to your address, phone, email, password or your Secret Question(s).

Please use the 'Add' button to add your new address, then click 'Save'.

Please don't use 'delete' as it is important for InFaith to retain a record of prior addresses.