



Spread Joy. Change Lives. Live Generously.

CHARITABLE GIVING WITH INFAITH



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As a new Thrivent Financial professional, InFaith Community Foundation welcomes you to a full range of charitable planning opportunities for you and your clients.

It's no secret that most InFaith donors come to us through you as part of an integrated financial discussion. Our 98% satisfaction rate speaks to the value of service donors receive from you and InFaith. In many ways, financial professionals are our frontline customer and relationship manager.

Together with Thrivent and its field force, we have built a billion dollar foundation that supports more than 10,000 different donor-recommended charities. And there are many, many more individuals and families ready to express their values, faith and life experiences through a custom InFaith giving plan.

Whether you're part of this history or new to it, we're here to serve you and your clients. We support your work with one-on-one consultations, promotional materials, website tools and seminars.

WE'RE HERE TO SERVE YOU

This handbook is an introduction of InFaith and the many services we offer you and your clients. Please call us whenever you need charitable support and resources. We're here to serve you.

phone: 800.365.4172 **email:** contact@inFaithFound.org

online: inFaithFound.org



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ABOUT INFaITH COMMUNITY FOUNDATION

InFaith Community Foundation, established in 1995, is a national charity with a mission to spread joy and change lives. Created by Thrivent, InFaith works with FPs to tailor gifts to each donor's charitable interests and financial circumstances.

InFaith is a proven steward of donor gifts, earning top ratings from Charity Navigator and GuideStar. Together with donors, InFaith now grants nearly \$30 million annually to charities serving local, national and global communities. Through InFaith, you also receive results-driven, practical giving solutions grounded in the belief that you can do good while doing well.

INTENTIONAL ALIGNMENT



Since inception, InFaith has partnered with Thrivent Financial to deliver competitive, donor-driven charitable products to members and new markets. This collaboration is reinforced through integrated training, resources and Thrivent's FP compensation program.

BENEFITS TO YOUR CLIENTS

Giving flexibility, exceptional customer service and trusted stewardship make InFaith an attractive choice among today's charitable options.

- Clients create a custom charitable fund to give to their favorite charities and have the option of providing immediate and long-term support.
- Choose from a full range of giving options, including cash, stock, qualified charitable distributions, real estate, bequests, beneficiary proceeds, life insurance, charitable gift annuities and charitable remainder trusts.
- Clients receive maximum tax benefits based on when and how gifts are made.
- We also offer a flexible endowment fund option for churches and faith-based nonprofits.

Our donor-centered approach has earned InFaith 98% donor satisfaction and consistently high ratings for sound fiscal management and transparency from Charity Navigator and GuideStar.

CALL TO LEARN MORE

To learn more about InFaith products and services, or to discuss a potential gift, please call. We're eager to serve you and look forward helping you and your clients spread joy and change lives.

HOW IT WORKS: INFaITH PRODUCTS



GIVE

Give Now.

Make an immediate, outright charitable gift of cash, stock or real estate*.

Give Later.

Maintain flexibility and control of assets while living. Charities receive support upon death. Options include life insurance, living trusts, bequests and beneficiary proceeds.

Give & Receive.

Convert gift assets into quarterly income payments through a charitable gift annuity or charitable remainder trust. The remainder provides charitable support.

GROW

Donor gifts are carefully invested for growth and maximum sustained support to charities.

GRANT

Grant support to donor-recommended charities and causes.

Donor Advised Funds

- Advise grants to any charity at any time.
- Designate charities/causes to receive automatic annual grants for a term of years or in perpetuity.

**Scholarship Funds Collaborative
Funds Organizational Endowment
Funds**

* Clients 70½ or older can create a non-advised charitable fund with gifts of qualified charitable distributions from an IRA. Contact InFaith Community Foundation for more information.

SIMPLE STEPS TO MAKE A GIFT

The following steps describe the process for creating a donor advised fund at InFaith:

1. The FP consults with InFaith to determine the best giving solution to meet the client's needs and interests.
2. For charitable gift annuities, charitable remainder trusts and life estate gifts, staff prepares a customized gift illustration that outlines tax and income benefits.
3. When ready to proceed, the *Fund Workbook* is completed by the donor, typically with assistance of their FP.
4. Once the *Fund Workbook* is received by InFaith, a *Fund Agreement* is drafted describing the donor's charitable interests. If the donor is establishing a gift annuity, charitable remainder trust or to make a gift of real estate, additional documentation is prepared.
5. Once the *Fund Agreement* is signed, InFaith assists with the transfer of gift assets. For gifts made upon death, the *Fund Agreement* remains in place until gift assets are received.

BENEFITS TO YOUR BUSINESS

1. **We simplify your work** and make giving easy and possible for you and your clients.
2. **You remain the primary contact** with your client.
3. **No special qualifications** are needed to bring gifts to InFaith.
4. **Clients have flexibility** to support any IRS-qualified public charities and can make changes if they wish.
5. **Maximum tax benefits** are provided based upon when and how gifts are made.
6. **Gifts receive proven stewardship** – InFaith earns consistently high ratings from Charity Navigator and GuideStar for sound fiscal management, transparency and commitment to excellence.
7. **Prompt service and giving expertise** is provided through InFaith's staff of giving professionals.
8. **You are compensated** by Thrivent for gifts to InFaith.
9. **You have access** to a simple, flexible option for organizational endowment funds and a full range of giving options for supporters.
10. **You join more than 1,000 Thrivent FPs** who have brought outright and deferred client gifts to InFaith.

RESOURCES TO SUPPORT YOUR WORK

InFaith supports you and your clients with resources and one-on-one support. Visit inFaithFound.org/advisors to access these resources or call 800.365.4172.

One-on-One Phone Consultations & Training

InFaith attorneys, accountants and charitable experts provide training and work with you to create the best giving solution for your clients*.

InFaith Insights

InFaith *Insights* is a monthly e-newsletter for financial professionals. Each month InFaith Insights will deliver to your inbox concepts and resources you can use to build your charitable business with your clients. Sign up at inFaithFound.org/advisors-subscribe.

InFaith Marketing Materials

Promotional brochures are available to educate you and your clients. Call InFaith or order online at inFaithFound.org/request-materials.

Individual Donor & Endowment Seminars

Use simple, straight-forward presentations with speaker notes to share giving ideas with prospects.

Gift Illustrations & Gift Calculator

Contact InFaith gift planners to learn tax deductions and other giving benefits through personalized gift illustrations for charitable gift annuities and charitable remainder trusts.

Online Access

Online access is provided to monitor your clients' charitable fund.

Charitable Fact Finder

Questions for clients regarding financial security, charitable interests and more to help you start a meaningful charitable conversation.

* InFaith Community Foundation is a public charity that serves donors and the community through charitable funds, and is independent of Thrivent and its financial representatives. Charitable giving can result in significant tax, legal and financial consequences. InFaith Community Foundation does not provide accounting or tax advice. Consult with your attorney or tax professional.

VISION

Throughout our community and by God's grace, we will achieve effective, positive and lasting change.

MISSION

To serve our donors with integrity as together we change lives and spread joy by sharing our blessings with the world.

VALUES

As a Christian organization, our work reflects our service, stewardship, collaboration, possibilities and results.

WE OFFER

- Donor advised funds, collaborative funds and organizational endowments.
- Full range of giving options, from simple to complex.
- Flexibility to give to any charity.
- Maximum tax benefits based on when and how charitable gifts are made.
- Donor-centered services including online access and family and women's giving resources.
- Mission-based investments for charitable assets.

InFaith Community Foundation is committed to environmental stewardship, printing on paper made from 100% post-consumer fiber using Green-e Certified renewable energy and meeting Forest Stewardship Council standards.

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