

## CHARITABLE GIVING THROUGH INFaITH

As a new Thrivent Financial representative, 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. In many ways, financial advisors are our front-line customer and relationship manager and our 95% donor satisfaction rate speaks to the value of service donors receive from you and InFaith.

Together with Thrivent and its field force, we have built a billion dollar foundation that supports more than 8,500 different donor-recommended charities. With projected increases in charitable giving nationwide, we believe 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 and training.

This handbook is our 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.



In Faith,

Chris Andersen

President & Executive Director



### 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, non-advised charitable funds, collaborative funds and organizational endowments
- Breadth of giving options, including cash, stock, real estate, bequests, beneficiary proceeds, life insurance, charitable gift annuities and charitable remainder trusts
- Flexibility to give to any charity and make changes if you wish
- Maximum tax benefits based on when and how you give
- Donor-centered and online services

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Live Generously. Spread Joy. Change Lives.

# CHARITABLE GIVING WITH INFaITH

Spreading Joy. Changing Lives.™

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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 FRs 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 \$16+ 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

InFaith Community Foundation's mission is intentionally aligned with Thrivent Financial's mission to help Christians be wise with money and live generously. 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 FR 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 95% 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.

\* 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.



### 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

## 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 FRs** 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](http://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

Monthly e-newsletter highlights giving ideas and resources you can use to build your charitable business with clients. Sign up at [inFaithFound.org/advisors-subscribe](http://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](http://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. Because InFaith Community Foundation cannot give tax or legal advice, donors are strongly encouraged to consult with their personal tax and legal advisors.

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