

Navigating Wealthscape InvestorSM

Quick, convenient access to your brokerage or managed account

Once you've enrolled at thrivent.com and logged in, you'll be directed to the **Account Overview** page. Select your brokerage account. On the **Account Details** page, you will see basic details about your brokerage account. On the right side of the page, click the "Manage your brokerage account" link to be redirected to the Wealthscape Investor site, where you can use the "Accounts" link in the upper left-hand corner to get a big-picture view of your investment portfolio, including individual account values and the total value of all your accounts.

From there, you can:

- Access your accounts, positions and balances—all from your favorite device.
- Create customizable position and history pages so you can view account data that's most important to you.
- Sort and filter your holdings with a click of a mouse or tap of a finger.
- Get real-time order status updates and two years of transaction history.

Accounts

As of 14-Sep-2018 3:57:22 PM ET

All Accounts (2)

\$9,636,986.09

Investment Accounts (1)

\$151,852.45

Individual (1)

\$151,852.45

033-000353

Unrealized G/L \$8,940.36 (6.26%)

Retirement Accounts (1)

\$9,485,133.64

My IRA

\$9,485,133.64

033-000116†

Open G/L \$496,311.96 (5.52%)

† The Gain/Loss (Open/Unrealized) summary is provided to you as a courtesy and for informational purposes only and should not be used or relied upon for tax reporting or other purposes.

Trade Service Tools Reports & Alerts Markets & Research Resources

My IRA 033-303030

Positions Balances Activity & Orders Documents Profile/Features Performance

Open/Unrealized Assets Held Away Previous Sales/Realized Loaned Securities Options Summary

Account Positions (Open/Unrealized) for 033-303030: 31 Position(s)

As of 14-Sep-2018 3:57:22 PM ET

Group By Security Type Search By Symbol Display

Security ID	Security Description	Closing Quantity	Recent Quantity	Recent Price	Recent Market Value	Account
Cash & Cash Equival...						
FZBXX	FIDELITY GOVT...	9,275,631.950	9,275,631.950	\$1.00000	\$9,275,631.95	Cash
Common Stocks/ETF...						
38259P508	GOOGLE INC CL A	225.000	225.000	--	--	Cash
82967N108	SIRIUS XM RADI...	14.000	14.000	--	--	Cash
852061100	SPRINT NEXTEL...	12.000	12.000	--	--	Cash
A	AGILENT TECH INC	136.000	136.000	\$37.18000	\$5,056.48	Cash
AMD	ADVANCED MICR...	3.000	3.000	\$2.16000	\$6.48	Cash
BAC	BANK OF AMERI...	-100.000	-100.000	\$13.97000	-\$1,397.00	Cash
C	CITIGROUP INC...	20.000	20.000	\$42.38000	\$847.60	Cash

Your adventure begins at the Accounts panel

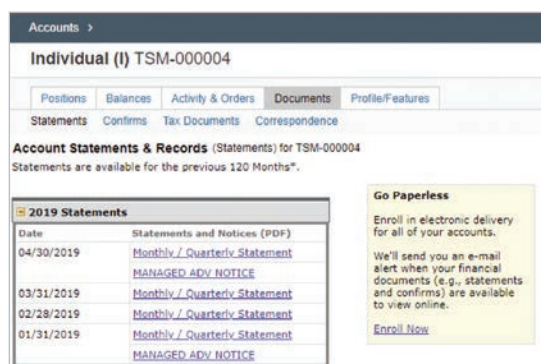
If it isn't already open, select **Accounts** to display the Accounts panel. Reselect **Accounts** to hide the panel and expand the window area to the right of the panel.

Dive even deeper using the menu bar

After you select an account, the menu bar above the window offers options to let you review:

- Account statements.
- Trade confirmations.
- Tax documents.
- Letters and other correspondence.

1. Select an account. Positions held in that account will be displayed in the area to the right of the panel.
2. Use the tabs on the menu bar at the upper right to navigate to other account-related windows, like **Balances** or **Activity & Orders** for the selected account.

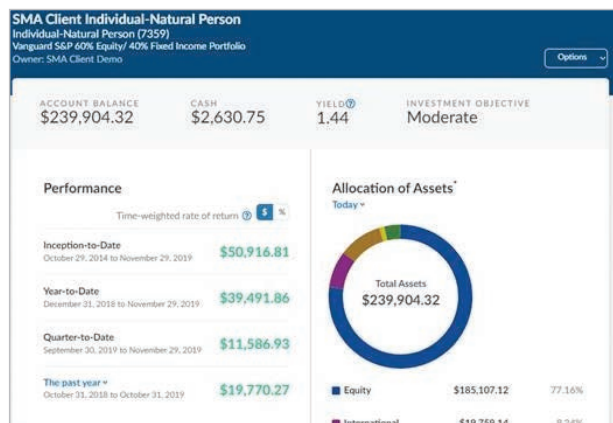
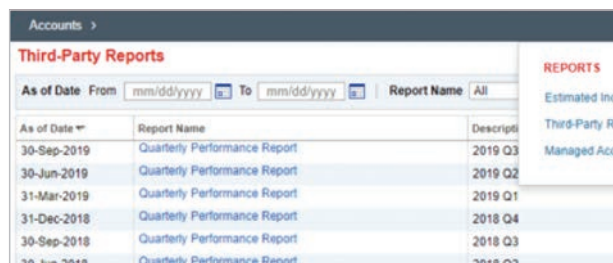
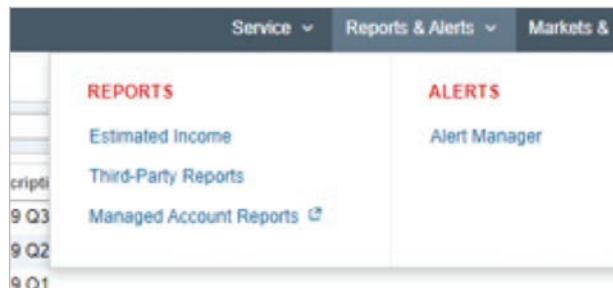


Accounts >													
Individual (I) TSM-000004													
Positions Balances Activity & Orders Documents Profile/Features													
Statements Confirms Tax Documents Correspondence													
Account Statements & Records (Statements) for TSM-000004													
Statements are available for the previous 120 Months*.													
<table border="1"> <thead> <tr> <th colspan="2">2019 Statements</th> </tr> </thead> <tbody> <tr> <th>Date</th> <th>Statements and Notices (PDF)</th> </tr> <tr> <td>04/30/2019</td> <td>Monthly / Quarterly Statement MANAGED ADV NOTICE</td> </tr> <tr> <td>03/31/2019</td> <td>Monthly / Quarterly Statement</td> </tr> <tr> <td>02/28/2019</td> <td>Monthly / Quarterly Statement</td> </tr> <tr> <td>01/31/2019</td> <td>Monthly / Quarterly Statement MANAGED ADV NOTICE</td> </tr> </tbody> </table>		2019 Statements		Date	Statements and Notices (PDF)	04/30/2019	Monthly / Quarterly Statement MANAGED ADV NOTICE	03/31/2019	Monthly / Quarterly Statement	02/28/2019	Monthly / Quarterly Statement	01/31/2019	Monthly / Quarterly Statement MANAGED ADV NOTICE
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Go Paperless Enroll in electronic delivery for all of your accounts. We'll send you an e-mail alert when your financial documents (e.g., statements and confirms) are available to view online. Enroll Now													

Additional managed and retail account reporting and performance reports

Use the menu bar to access additional reporting. For example:

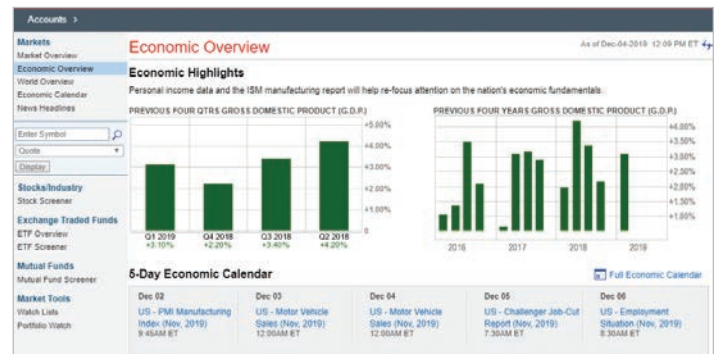
- The **Managed Account Reports** link will connect you to a client portal, where on-demand account reporting and performance is available.
- The **Third-Party Reports** link will help you find historical **Quarterly Performance Reports**.
- If you own both Managed and Retail brokerage accounts, you may combine performance through the Investor Portal by asking your advisor to link your accounts and completing the Consolidated Quarterly Performance Report Authorization form (24710A).



Market data and research tools help you visualize the big picture

Wealthscape Investor offers valuable resources to help you track your portfolio and explore market events, including:

- Dynamic charts and analytics.
- Powerful investment screeners.
- Detailed investment profile reports.
- Comprehensive company profiles and fundamentals.
- Interactive world overview perspective with drill-down exchange data by country.
- An economic overview with one-click access to a five-day economic calendar.



Self-service tools help you manage information, initiate transactions

Wealthscape InvestorSM self-service resources help you ensure your personal information is current and initiate trades and access your funds—when it's convenient for you. For example, you can:

- Update your personal account profile information.
- Place trades (retail brokerage only).
- Request fund transfers.

On the **Account Profile** page, you can update your day and evening phone numbers, legal/mailling address and email address. Just click the “Edit All” link on left-hand menu, make the necessary updates, and click the “Save” button in the lower right.

Account Summary (Account Profile) for: 033-180709

Account Setup

Account Holders (1)

Account Characteristics

Account Agreements

Account Features

Affiliated Bank Information

Authorized Traders (2)

Interested Parties (0)

Account Stakeholders (0)

Beneficiaries (0)

Managed Account Product

Open All | Edit All

Account Holders (1)

PPOATOVINE, MASH (Primary) : Individual (INDV)

Holder: PPOATOVINE, MASH

Relationship Type: Individual (INDV)

Day Phone Type: Domestic

Day Phone: 987-234-7932

Ext:

Evening Phone Type: Domestic

Evening Phone: 987-245-7529

Ext:

E-mail: JONATHAN.LUCIAN

Verify E-mail: JONATHAN.LUCIAN

Legal Address: 3556 PEKINGESE TRAIL, ALBANY, GA 30002

Mailing Address: 3556 PEKINGESE TRAIL, ALBANY, GA 30002

Date of Birth (Age): 05-May-1955 (66)

Age: 66

Country of Citizenship: UNITED STATES

Securities Industry Affiliations

3210 Affiliation: --

Company: --

Occupation: NOT EMPLOYED

Address: --

Cancel Save

From these pages, you can trade mutual funds, stocks and exchange-traded funds (ETFs) and receive verification of your order(s).

To navigate to this page, select Menu > Trade. Then select Mutual Funds or Equities.

Next, enter your desired trade order, verify the details, and select the Send Now button in the lower right to complete.

Order Entry - Stocks/ETFs

Action: B - Buy

Quantity: 100

Quantity Type: Shares

Est Dollars: \$14,706.00

Symbol/CUSIP: AAPL

Price Type: M - Market

Special Condition:

Reset Verify

Order Verification - Stocks/ETFs

Warning: Please use caution when placing market orders while the market is closed. Securities may open sharp.

Order

Action: B - Buy

Quantity: 100.000

Quantity Type: Shares

Symbol/CUSIP: AAPL/037833100

Description: APPLE INC

Last: \$147.0600

Bid: \$146.8800 x 3

Ask: \$146.9000 x 43

As of: 05-Aug-2021 07:59:58 PM ET

Price Type: M - Market

Time in Force: Day

Account Type: Cash (1)

Estimated Order Value

Please note that the estimated principal order value does not include estimated commissions or fees.

Est. Principal Order Value: \$14,690.00

Est. Commission: \$3.00

Est. Fees: \$3.50

Est. Net Order Value: \$14,696.50

Edit Send Now

From this page (below), you can request checks to be sent to the address of record, request first-party EFT withdrawals and receipts (including contributions to Traditional, Rollover and Roth IRAs), and request first-party journals of cash between your accounts.

To navigate to this page, select Menu > Service > Money Movement, and then choose Transfer/Withdraw Money.

Transfer/Withdraw Money

Accounts

Markets & Research

Quote

Book marks

Where do you want to transfer FROM?

Individual (I) - 033-180709 | Cash Avail. to Withdraw \$15,786.99

Quick Balance

Where do you want to transfer TO?

Choose One

Choose One

Traditional IRA (IRA) - 033-180714 | Cash Avail. to Withdraw \$3,758.03

Individual - Transfer on Death (TODI) - 033-181105 | Cash Avail. to Withdraw \$9,422.36

Rollover IRA (IRRL) - 033-181152 | Cash Avail. to Withdraw \$0.00

Individual - Transfer on Death (TODI) - 033-181561 | Cash Avail. to Withdraw \$500.00

Individual (I) - 033-181591 | Cash Avail. to Withdraw \$0.00

Individual (I) - 033-181593 | Cash Avail. to Withdraw \$0.00

Individual (I) - 033-181599 | Cash Avail. to Withdraw \$0.00

Joint - Tenants in Common (TIC) - 033-182002 | Cash Avail. to Withdraw \$0.00

Individual (I) - 033-184047 | Cash Avail. to Withdraw \$0.00

A Banking Account

A Check to my Mailing Address

Warning: If you are requesting a transaction after hours, your request will be processed but is subject to standard reviews and approvals. Please check the pending transfers page for the status of this transaction. Please contact your Investment Representative or Broker-Dealer for assistance.

Transfer Information

From Account #

Individual (I) - 033-180709 | Cash Avail. to Withdraw \$15,786.99

To Mailing Address

MASH PPOTATOVINE
3558 PEKINGESE TRAIL
ALBANY GA 30002

Amount

\$100.00

Warning: By submitting this request, I am attesting that I am authorized to perform this transaction for this brokerage account and that the instructions are accurate.

Cancel

< Edit

Submit >

Requests submitted after 4:00 PM ET will be processed the following business day. Please contact your Investment Representative or Broker-Dealer with details and for further questions.

Questions?

Call Thrivent toll-free at 800-847-4836 and say “Brokerage” at the prompt, or contact your Thrivent financial advisor.

Once your transaction is complete, you will receive verification.

Requirements:

- \$100,000 maximum for all transactions.
- Standing instructions (i.e., bank information) must be pre-established.

Verification - Transfer/Withdraw Money

Accounts

Markets & Research

Quote

Book marks

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Transfer Information

From Account #

Individual (I) - 033-180709 | Cash Avail. to Withdraw \$15,786.99

To Mailing Address

MASH PPOTATOVINE
3558 PEKINGESE TRAIL
ALBANY GA 30002

Amount

\$100.00

Warning: By submitting this request, I am attesting that I am authorized to perform this transaction for this brokerage account and that the instructions are accurate.

Cancel

< Edit

Submit >

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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 or FINRA's BrokerCheck for more information about Thrivent's financial advisors.

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