thrivent®

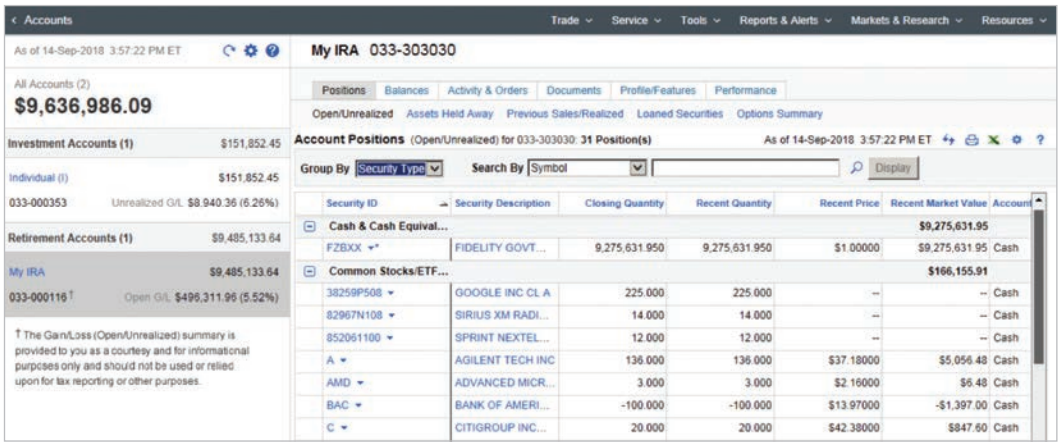
Navigating Wealthscape Investor℠

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.



Your adventure begins at the Accounts panel

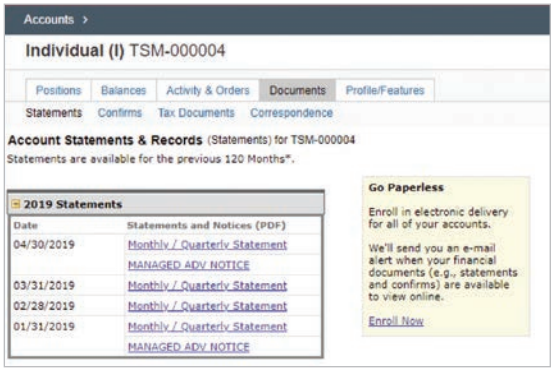
If it isn't already open, select **Accounts** to display the Accounts panel. Reselect **Accounts** to hide the panel and expand the window area to the right of the panel.

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.

Dive even deeper using the menu bar

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

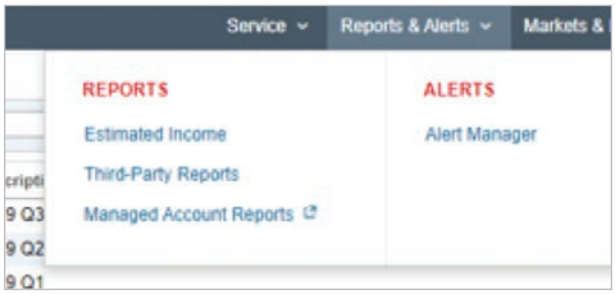
- Account statements.
- Trade confirmations.
- Tax documents.
- Letters and other correspondence.



Additional managed and retail account reporting and performance reports

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

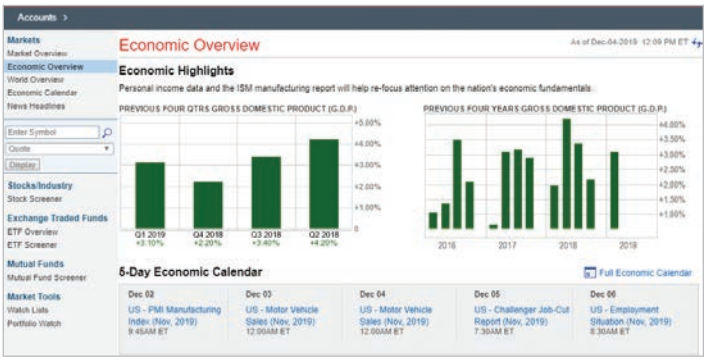
- The **Managed Account Reports** link will connect you to a client portal, where on-demand account reporting and performance is available.
- The **Third-Party Reports** link will help you find historical **Quarterly Performance Reports.**
- If you own both Managed and Retail brokerage accounts, you 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.

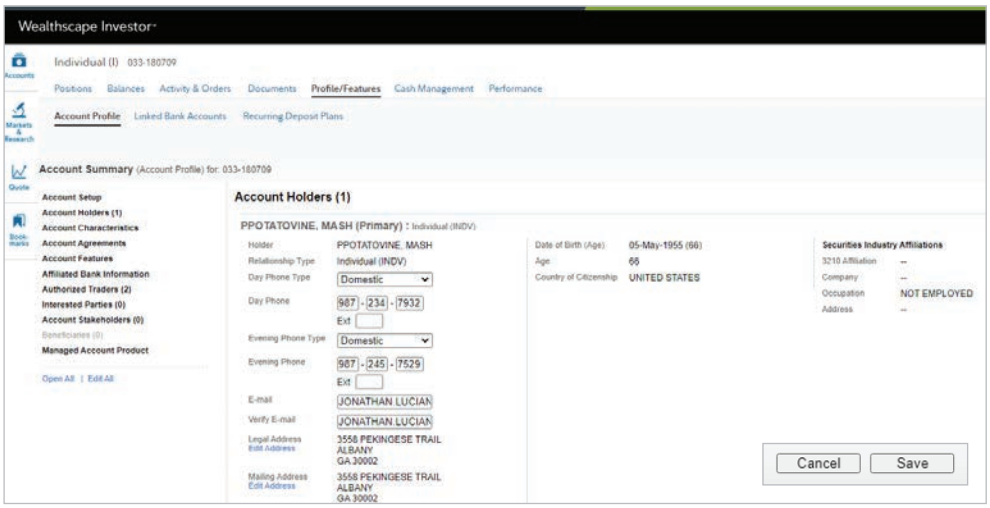


Self-service tools help you manage information, initiate transactions

Wealthscape Investor℠ 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:

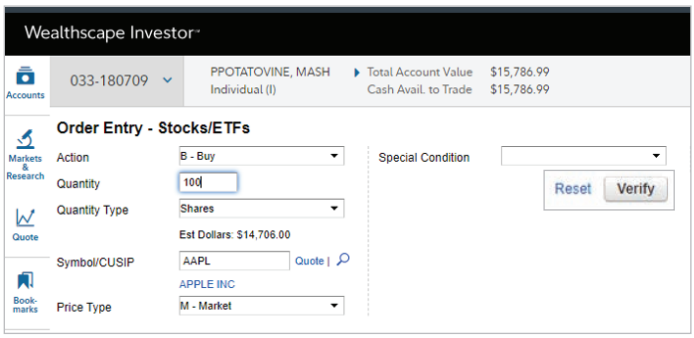
- Update your personal account profile information.
- Place trades (retail brokerage only).
- Request fund transfers.

On the **Account Profile** page, you can update your day and evening phone numbers, legal/mailing 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.

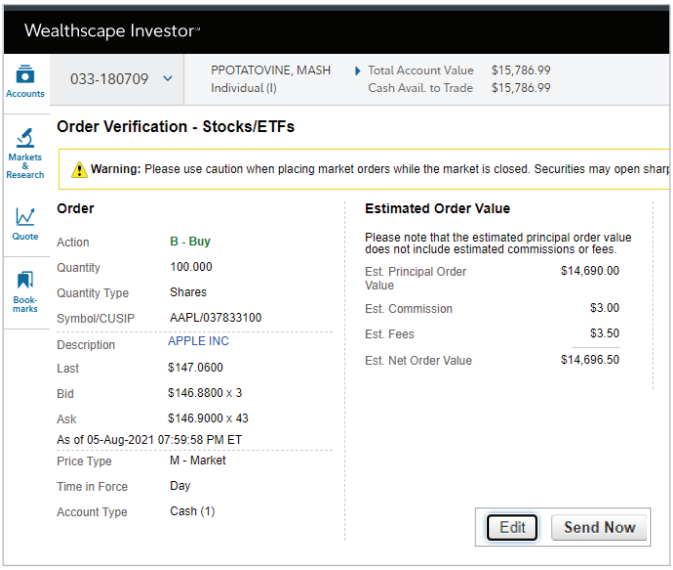


From these pages, you can trade mutual funds, stocks and exchange-traded funds (ETFs) and receive verification of your order(s).

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

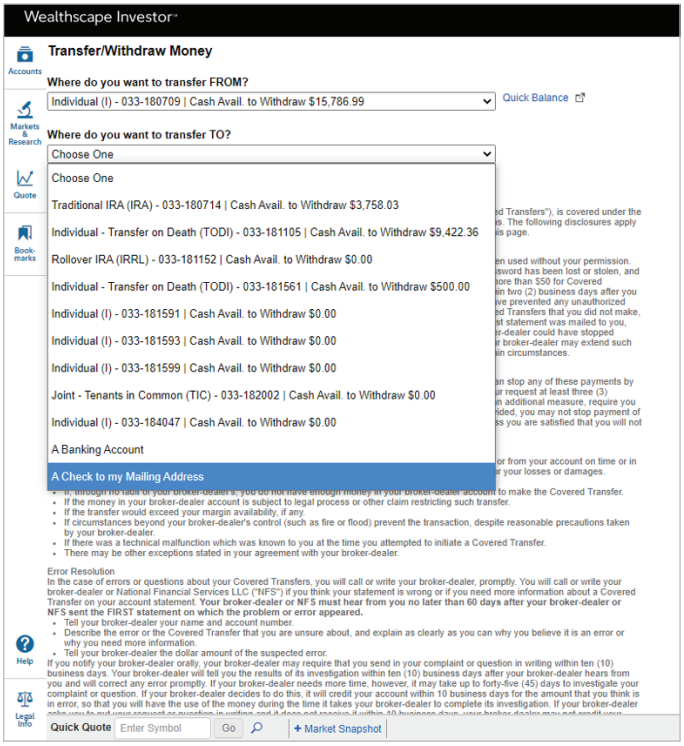


Next, enter your desired trade order, verify the details, and select the Send Now button in the lower right to complete.



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.

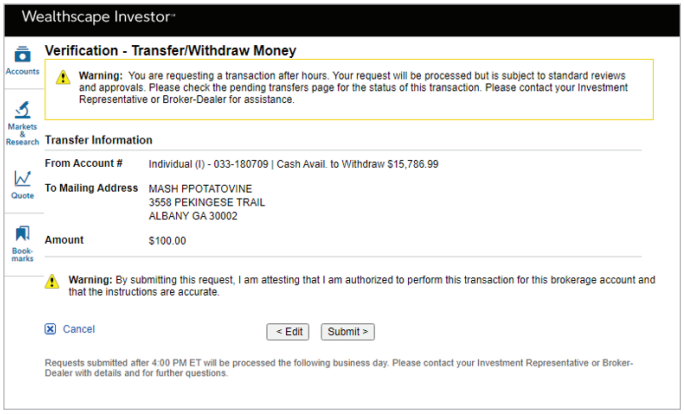
To navigate to this page, select Menu > Service > Money Movement, and then choose Transfer/Withdraw Money.



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.



Questions?

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