

## Nonqualified Account Transfer

**Section 1 - General Information**

Name of owner (print first, middle, and last name)	Date of birth
Name of joint owner (print first, middle, and last name)	Date of birth
Existing Thrivent Funds account number(s)	

**Section 2 - Fund Selection**

Approximate amount of the transfer - \$ \_\_\_\_\_

I instruct Thrivent Funds to invest the transferred proceeds into the existing Thrivent Funds account number referenced in Section 1 as follows:

- In accordance with the fund selection provided in the Thrivent Funds Application attached to this form.  
 As directed in the table below:

Fund Number	Percent	Fund Number	Percent
	%		%
	%		%
	%		%
	%		%

**Total percent must equal 100%**

**Section 3 - Transfer Instructions to Releasing Company**

I instruct the releasing company to execute a:

- Full liquidation  
 Partial liquidation of \$ \_\_\_\_\_

I instruct the releasing company to transfer:

- In-kind shares (selecting this box authorizes a transfer in-kind of Thrivent Funds shares held at the releasing company to Thrivent Funds)  
 Immediately  
 Upon maturity date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
month      day      year

**Section 4 - Current Plan Information**

Name of releasing company		Current account number	
Overnight address of releasing company	City	State	ZIP code
Name of account owner(s)		Phone of releasing company	

Indicate each account number and fund being transferred from. Provide a copy of your most recent statement.

Account Number	Fund Number, CUSIP Number or Ticker

**Section 5 - Agreements and Signatures**

I authorize the liquidation or transfer of in-kind assets noted in Section 3 that your company holds for me.

I agree to the Disclosures at the end of this form and any other disclosures contained in this form.

Signature of owner	Date signed
<b>X</b>	
Signature of joint owner/trustee	Date signed
<b>X</b>	

Your resigning trustee or custodian may require your signature to be guaranteed. Call that institution for requirements.

A medallion signature guarantee is not the same as a notarized signature. You must obtain a medallion signature guarantee from a commercial bank, trust company, savings association, credit union, or a registered broker/dealer that participates in the medallion signature guarantee program. The guarantee must state the words "Medallion Signature Gurantee Stamp."

Medallion Signature Guarantee or Notary Seal	Medallion Signature Guarantee or Notary Seal

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**Section 6 - Instructions to Releasing Company**

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- Make the check(s) payable to Thrivent Funds
- Include the Thrivent Funds account number and FBO information
- Send the check(s) to the address listed on the letter of acceptance
- Certificates are not accepted

**Mail completed form to:****Regular Mail:**

Thrivent Funds  
PO Box 219348  
Kansas City, MO 64121-9348

**Express Mail:**

Thrivent Funds  
430 W 7th St  
Kansas City, MO 64105

**Fax:**

866-278-8363

**Phone:**

800-847-4836

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**Disclosures**

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Sales of nonqualified assets may be a taxable event. Thrivent Funds recommends that you consult with a professional tax advisor regarding any questions concerning distributions from your nonqualified accounts.

**Cost Basis Information**

If your transaction will open a new fund, and you have not previously informed us of an election method that can be applied to new funds, the default method of Average Cost will be placed on the new fund.

Thrivent Funds cannot offer tax advice. You should consult with a qualified tax advisor to determine the method that makes the most sense for you, or if you have tax questions regarding your account.