

# Guidelines for Volunteer Leaders

How to Use Tax-Exempt Funds



## A new concept

We want to use our tax-exempt funds wisely and creatively to grow the organization so we can help our members more, and our members can help others more. The Purpose-Driven Guidelines provide boundaries for using tax-exempt funds to help us do that.

### The guidelines will:

- Offer new clarity on what's appropriate.
- Simplify decisions.
- Give your leadership board more freedom to appeal to members and help congregations and communities.

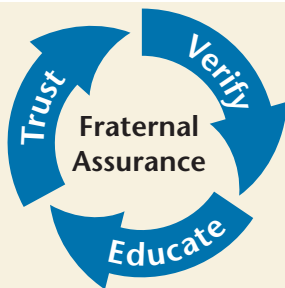
## What's changing?

- Less **rule**-based; more **principle**-based.
- More **flexibility** and **choice**.
- Sharing responsibility and accountability between volunteer leaders and Thrivent Financial. This approach empowers you to make decisions within boundaries.

*A quick way to know if the activity your volunteer leadership board is considering fits with the Purpose-Driven Guidelines:*

Primary Purpose	Tax-Exempt Purpose
Charitable Educational Social (Member Fellowship) Religious Patriotic	<input checked="" type="checkbox"/> YES
Promote Sales Promote Products Promote Services Entertain Prospects Product-Specific Education	<input type="checkbox"/> NO

## Moving from Rules to Curbs

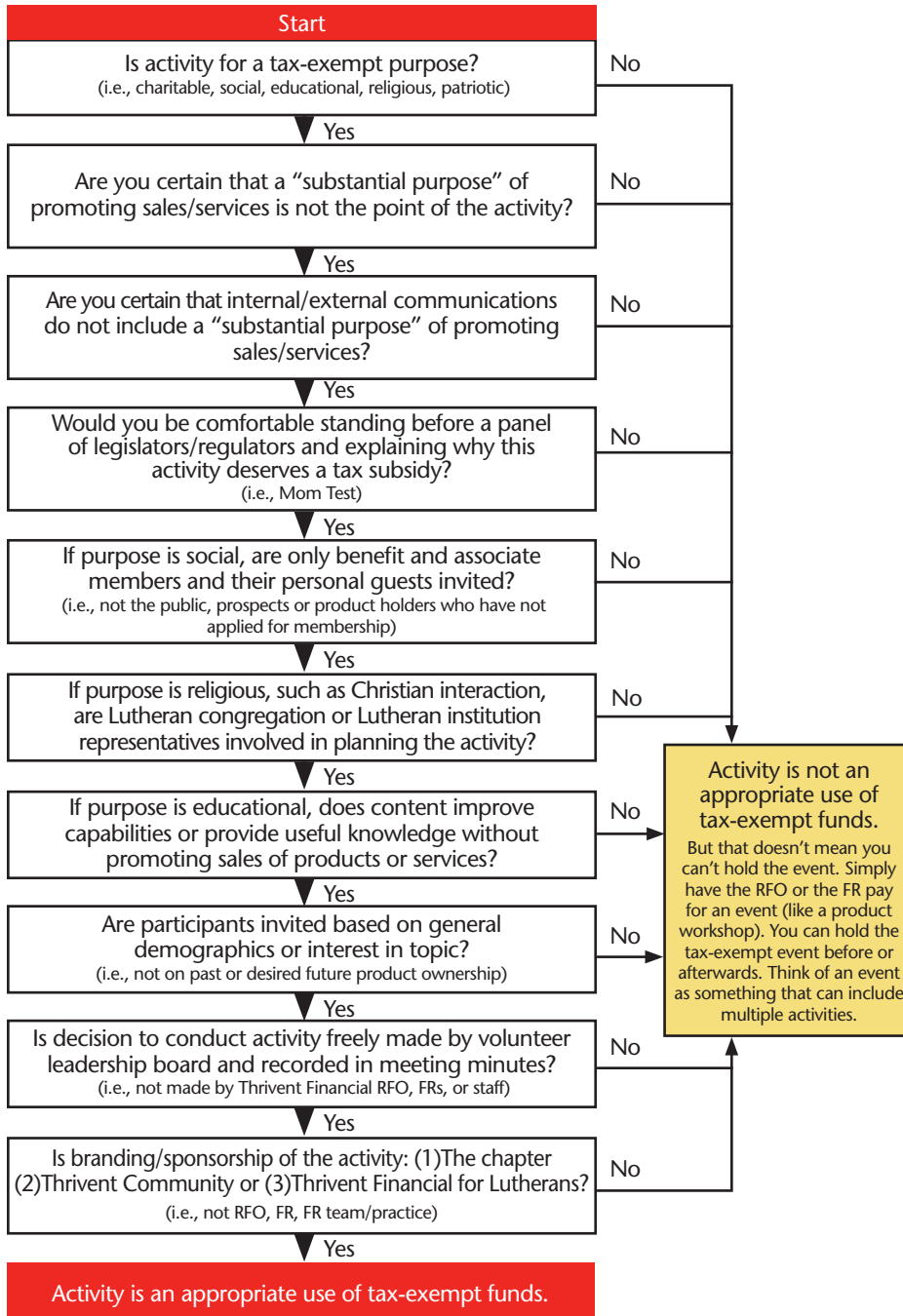


**EDUCATE, TRUST  
and VERIFY**

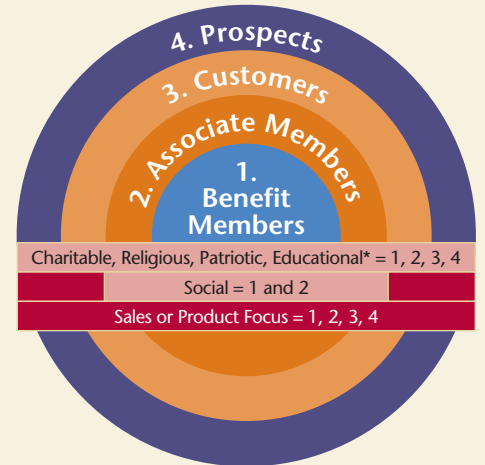
*Flexibility + Choice = Responsibility + Accountability*

# Tax-Exempt Decision Tree

to advance our tax-exempt purpose



## Thrivent Members



### Tax-Exempt Purpose

YES  NO

\*If education is not a product or service promotion.

1. **Benefit members** have applied for and been accepted into membership; they own fraternal benefit society products (insurance and annuities).
2. **Associate members** either own no products and pay a low annual fee, or own non-fraternal benefit society products. They have applied for and been accepted into membership.
3. **Customers** own nonproprietary products; they have not applied for membership.
4. **Prospects** qualify for membership but haven't yet applied.



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