



Thrivent Funds

Recharacterization Election

Section 1 - General Information

Name of owner (print first, middle, and last name)

Date of birth

Existing Thrivent Funds account number(s)

Section 2 - Recharacterization Instructions. Must be completed by the tax filing deadline, including extensions.

☐ Recharacterize entire Roth IRA or Traditional IRA balance. This option is available for accounts containing **only** funds that were contributed during the tax year relating to this recharacterization.

☐ Recharacterize only a portion of Roth IRA or Traditional IRA balance. Complete the following chart below.

Tax Year	Contribution Amount	Date(s) of Contribution
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	

☐ Yes ☐ No Should Automatic Purchase Plan for contribution be discontinued?

Section 3 - Intended Destination/Allocation of Dollars

Account Number	Fund Name/Share Class	Percent
		%
		%
		%
		%
		%
		%

Total percent must equal 100%

Section 4 - Agreements and Signatures

- When you choose to recharacterize a contribution, the net gain or loss attributable to the amount being recharacterized must be transferred along with the recharacterized amount.
- The recharacterization will be reported as specified by the Internal Revenue Service (IRS). In addition, you will have some personal income tax reporting as specified by the IRS because of the recharacterization.
- The IRS has placed restrictions on Roth IRA recharacterizations. Special rules apply if you exceed these recharacterization limits. Please contact your tax advisor before performing a recharacterization.

By choosing to recharacterize, I understand that this election cannot be revoked after the transfer is made.

Signature of owner	Date signed
X	

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

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