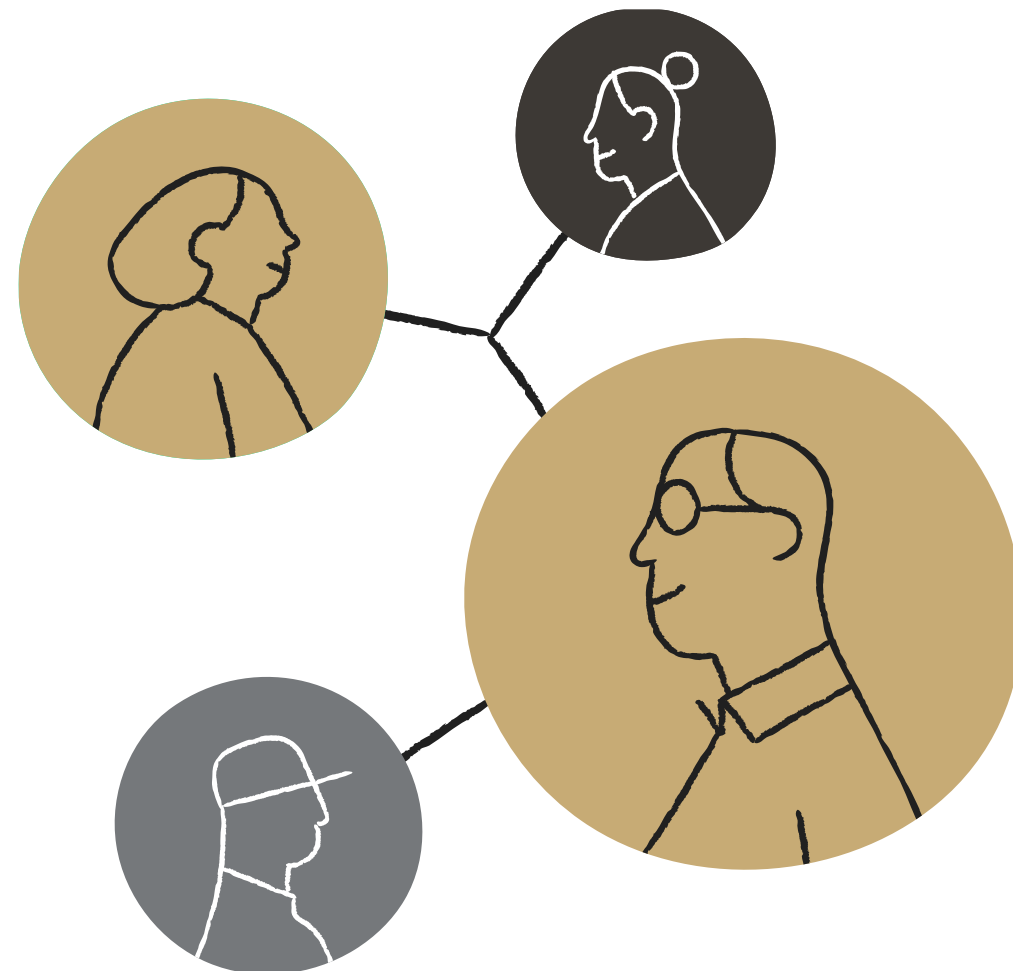
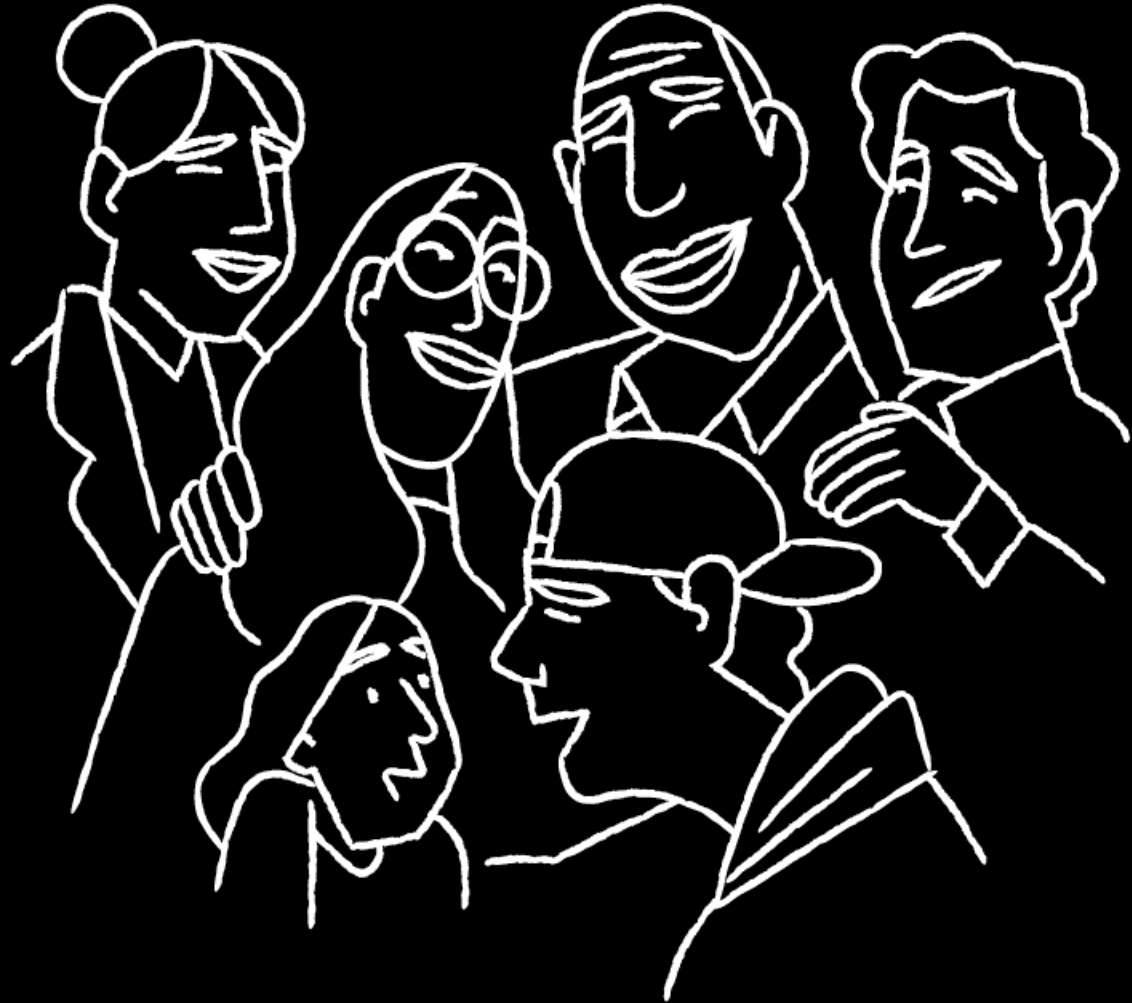


# A Purpose-Driven Company for Future Generations: Beginning with Brand

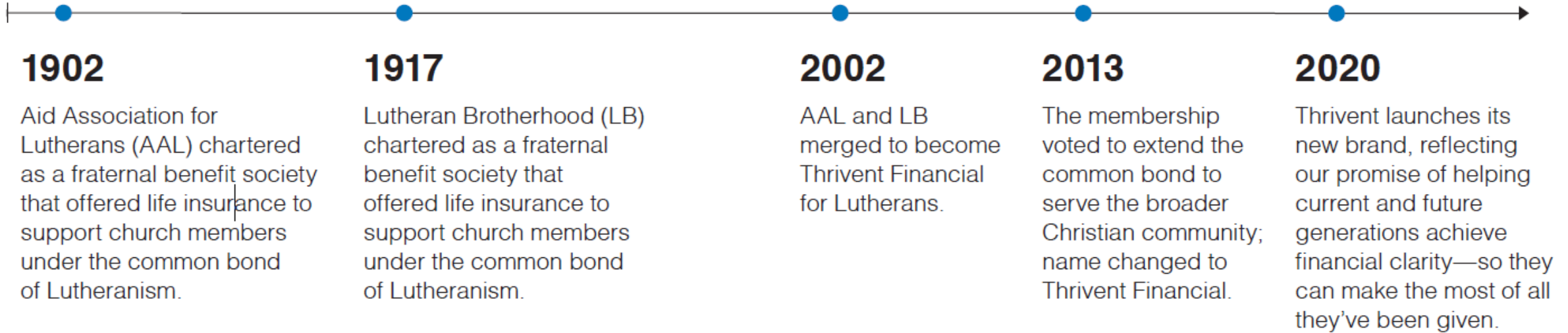
Lisa Flanary



# Who we are



# Our history



We help people achieve financial clarity

Thrivent is a diversified financial services organization providing financial advice, investments, insurance, banking and generosity programs to help people make the most of all they've been given.



# Ways we help you



## Advice

We get to know our clients and understand their values so we can create financial strategies customized for them.



## Investments

Our investment options help you build a diversified portfolio and invest with confidence.



## Insurance

We have the right insurance offerings to protect what matters most in life.



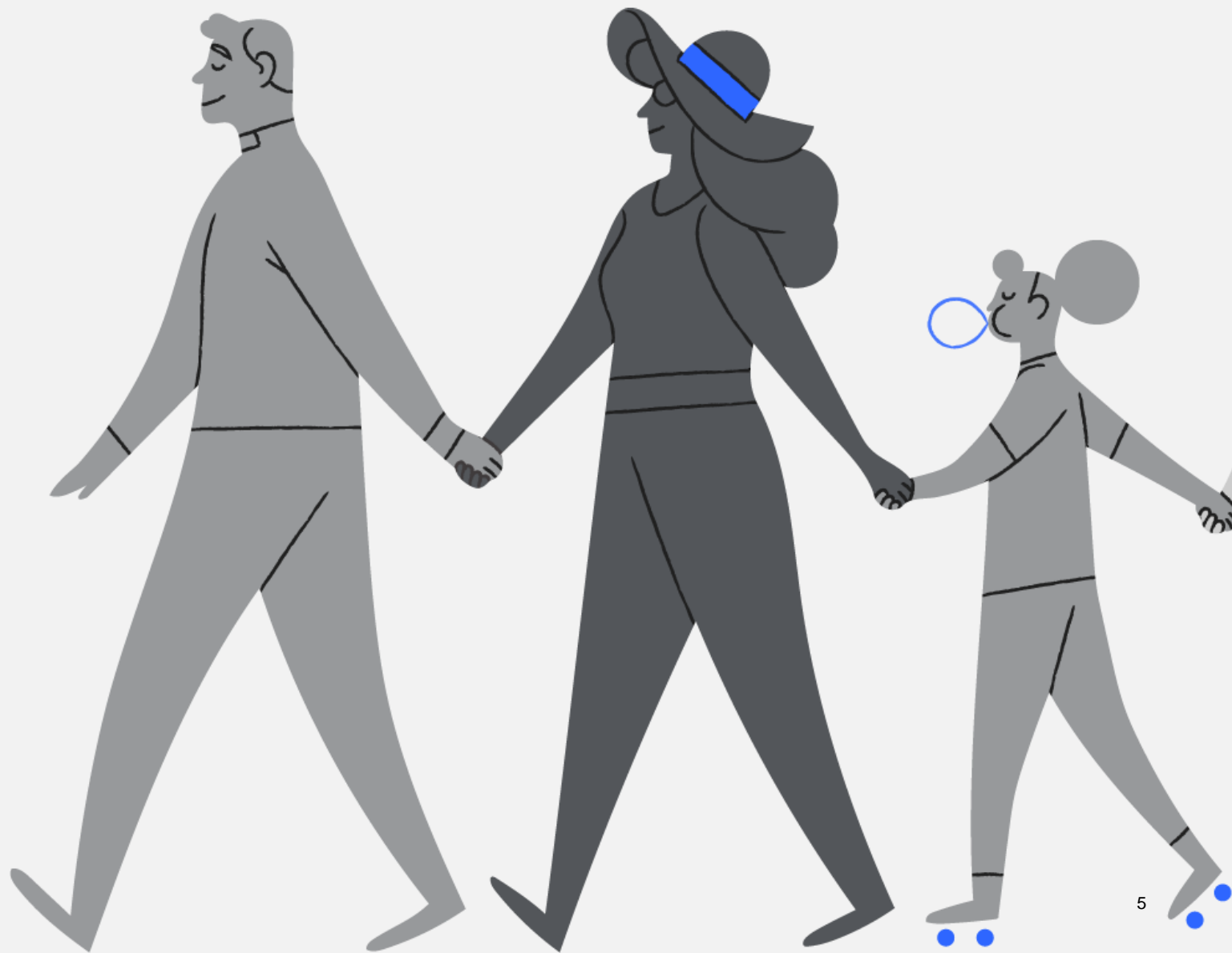
## Banking

We enable our clients to manage, track, save and spend money to support their goals.



## Generosity

We offer a variety of products and programs that give our clients opportunities to make a difference.



# Strong and stable

For over 100 years, Thrivent has helped people build their financial futures and live more generous lives. Today, we're a Fortune 500 company, offering a full range of expert financial solutions, serving over two million clients, as well as the communities in which they live and work.



**\$162 billion  
assets under  
management/  
advisement\***



**\$12.8 billion  
total adjusted  
surplus\***



**A++ (Superior)  
AM Best**

Highest of 13 rating categories<sup>1</sup>  
June 2021 • AMBest.com



**Serving 2.3  
million clients**

**ETHISPHERE®  
WORLD'S MOST  
ETHICAL  
COMPANIES®  
2012-2021**

\*As of Dec. 31, 2020.

<sup>1</sup>Ratings are based on Thrivent's financial strength and claims-paying ability, but do not apply to investment product performance.

"World's Most Ethical Companies" and "Ethisphere" names and marks are registered trademarks of Ethisphere LLC. For details, visit [Ethisphere.com](https://www.ethisphere.com).

# A legacy of promises kept

At Thrivent, we're honored to help people achieve financial clarity, Enabling lives full of meaning and gratitude. In 2020, we continued to deliver on our commitments:



**\$556 million  
guaranteed retirement  
income paid\***



**\$1.76 billion in life  
and health insurance  
claims paid\***



**\$329 million  
dividends paid out  
to clients\***

## Committed to generosity

Giving back is important to our clients. Since our beginning, Thrivent has provided clients with tools to create impact. In 2020 alone, Thrivent inspired generosity in many ways, including:



**9 million  
volunteer hours\***



**\$208 million  
raised and donated  
by Thrivent, clients  
and others\***



**1.6 million clients  
and others volunteered  
or gave financially\***

\*As of Dec. 31, 2020.  
Dividends are not guaranteed.

# Why are we transforming?

- To stay relevant in a changing marketplace.
- To help millions who need financial clarity.





# As the market is changing, we need to transform our business to position ourselves for future growth



## **New Disruptors**

These continue to emerge and challenge incumbents.



## **Customer Expectations**

Business approaches have shifted from product-centric to customer-centric.



## **Digital Trends**

Technology has opened new doors of possibility.

Helping millions  
of people achieve  
financial clarity



# Key components to transform

1

Shared  
Purpose

2

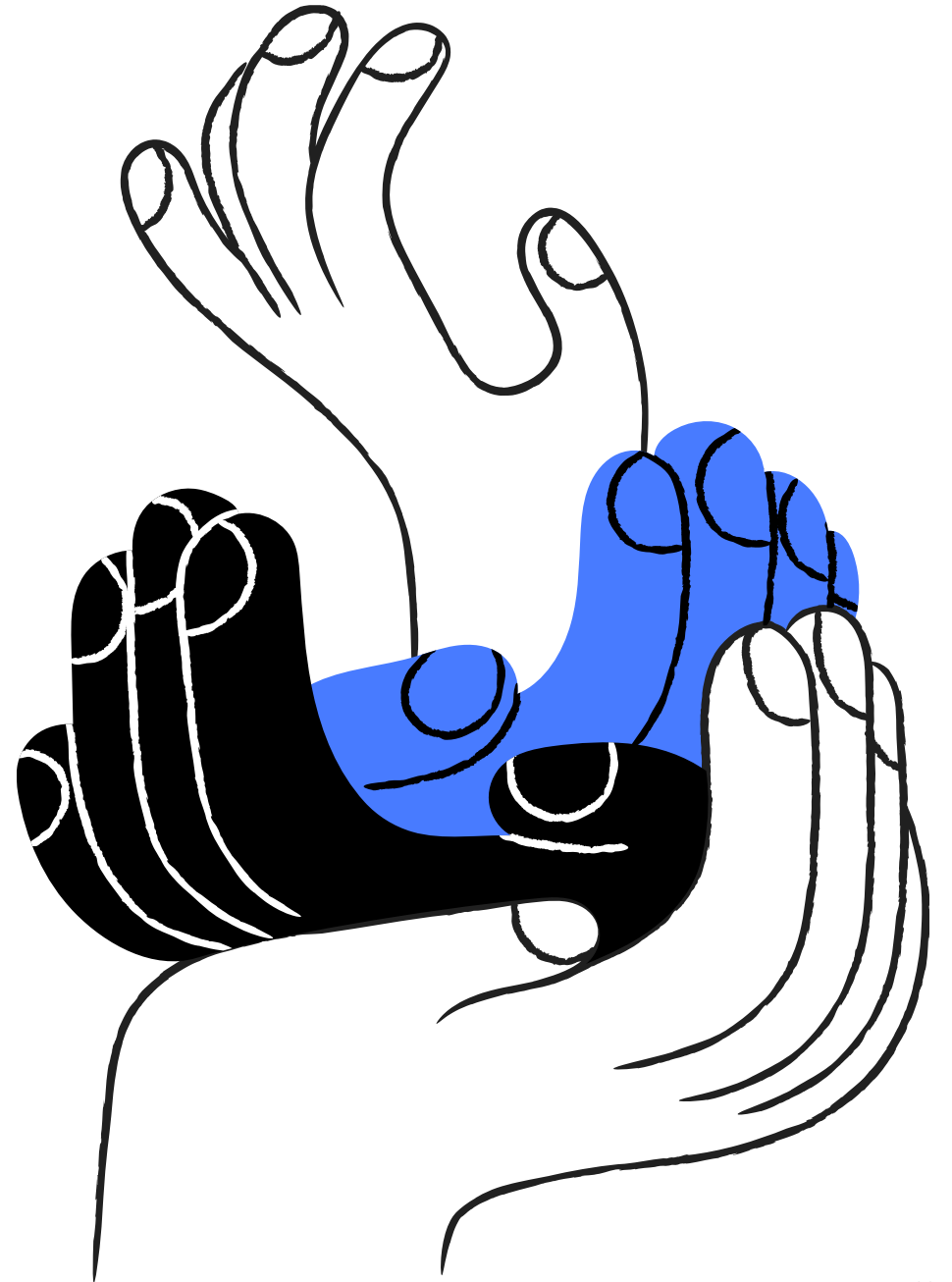
One  
Big Goal

3

One  
Plan

4

One  
Brand



# We've made great progress on our transformation in 2020



**Launched  
our brand**



**Created our first  
national  
advertising  
campaign**



**Completed our new  
Corporate Center**

# Our New Brand



# thrivent

Advice | Investments | Insurance | Banking | Generosity

# Building a relevant brand that delivers what our future clients seek

**An organization  
that aligns with  
their values**



**An expert partner to  
guide financial  
decision-making**



**Modern, digital  
experiences that meet  
their needs**



**Our Shared  
Purpose**



**Verbal Identity**



**Visual Identity**



**Advice Philosophy**



**Website**



**Digital Customer  
Experiences**

**Key strategic pieces of our brand**

Another

2

4

Unlocking Financial Clarity

We believe humanity thrives when people make the most of all they've been given

Mutual Funds

75% Stocks 25% Bonds

Save for Retirement

FPO



Thrivent Newsletter

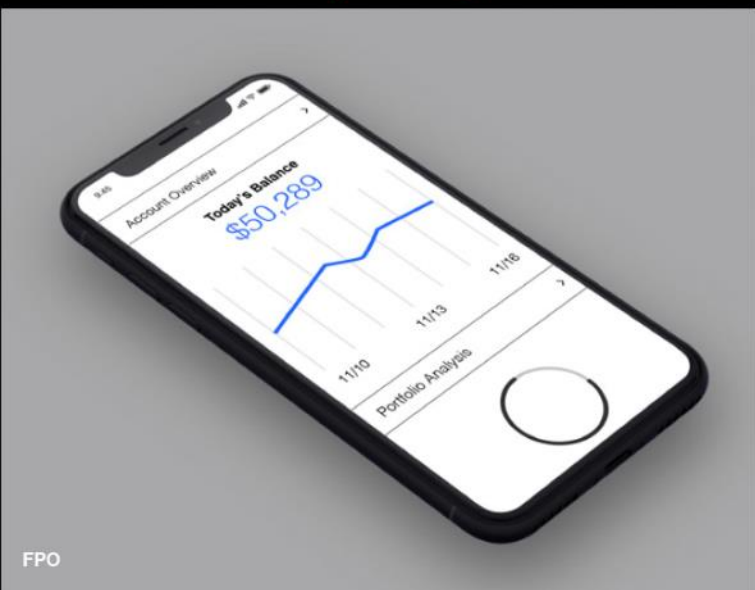
thrivent

Weekly Newsletter

Member Spotlight

The Smith Family

FPO



thrivent

About Us What We Offer Connect With Us Log In

Financial resources that fit you. And your values.

Learn More

MacBook Pro

FPO





We believe life is better when it has a purpose.



How We're Different

At Thrivent, we believe money is a tool, not a goal. And when managed the right way, it can afford you a life rich with meaning and gratitude.

Part customer-owned fraternal organization, part expert financial services institution, we serve many types of customers.

How We Work

We're reaching more people.

We've always held the belief that humanity thrives when people make the most of all they've been given.



Financial clarity is different for everyone. It's deeply personal. And you can achieve financial clarity no matter your net worth, the size of your house, or the kind of car you drive.

— Terry Rosenbaum | CEO, Thrivent Financial



We put our customers first.

Everything we do, we do with your best interest in mind. That's always been our philosophy.

Our Story

Membership At Thrivent

Part of our business is a fraternal benefit society. As such, we're a not-for-profit organization owned by the people investing with us.

How We Work



A range of financial solutions. More ways to thrive.

What We Offer

We provide insurance, banking, investment options and financial advice that aligns with your needs and priorities.



Advice

We get to know you, and help you create a financial plan that fits your priorities.

Learn More



Investments

Our investment options let you balance performance and purpose.

Learn More



Insurance

We have the right insurance offerings to protect what matters most to you in life.

Learn More



Banking

We enable you to manage, track, save and spend money to support your goals.

Learn More



Generosity

Thankful for all you've been given? We can help you give back.

Learn More

Your financial journey starts with the first step.

We all have questions about our financial future. Select from the menu below to find out how we help you answer them.

How can Thrivent help you? No matter where you need guidance, we can help. With banking, insurance, investments and personalized financial guidance, we have products and services that fit wherever you are in life.

Connect with us.

We're excited to be part of your journey and ready to answer your questions.

Contact Us



Our difference is you.

Connect with us.

Different needs, different ways to connect.

Whether you want to talk to a real person, request information or connect with us at a workshop, we're here for you.

Contact Us form with fields for name, email, phone number, zip code, and a dropdown for 'How would you like us to contact you?'. Includes a 'Find a Rep' button and contact information for Member Care Services and Financial Professionals.

Workshops & Events

We offer hands-on workshops on managing your money, planning for education and retirement, and achieving your life goals. Find one that's right for you.

Four workshop cards: 'More Than Money Matters', 'Advanced Workshops', 'Attend A Webinar', and 'Generation Generosity'. Each card includes a small image and a brief description of the workshop.

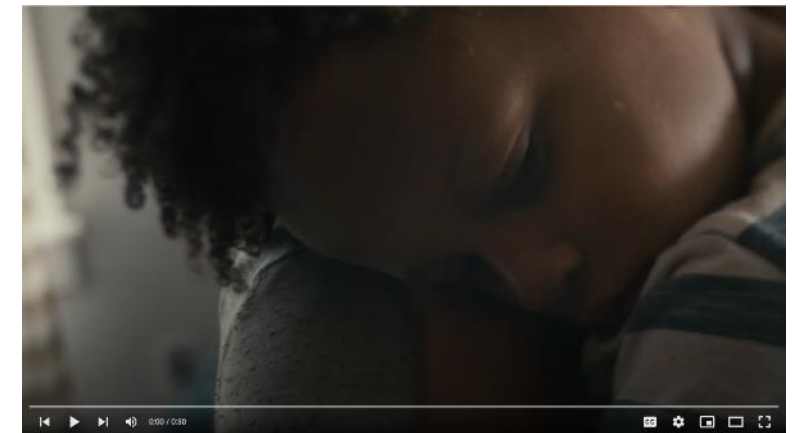
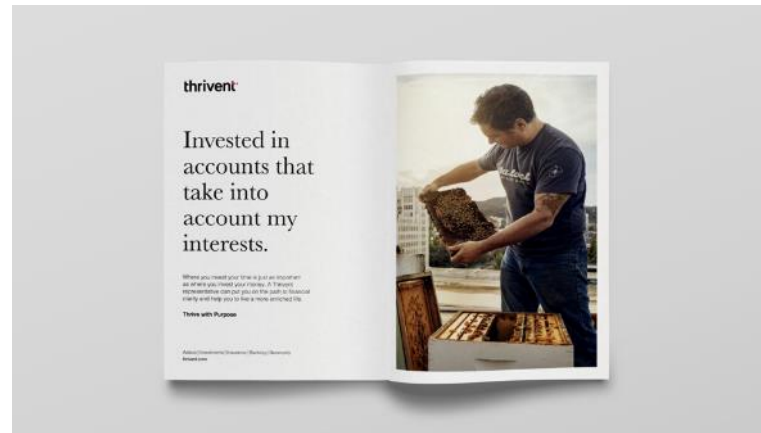
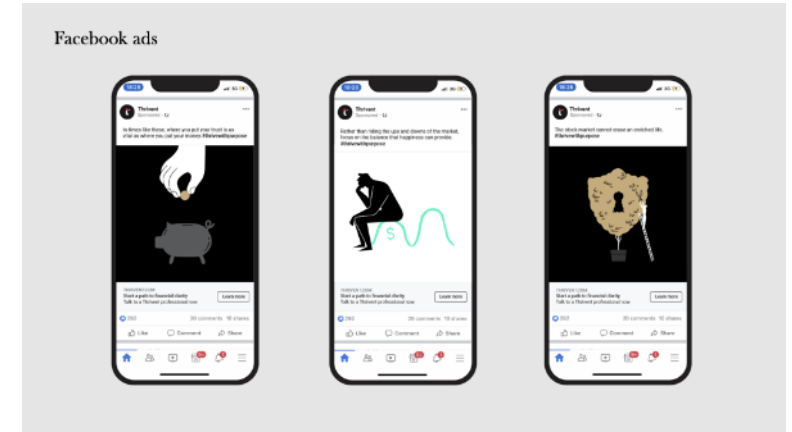
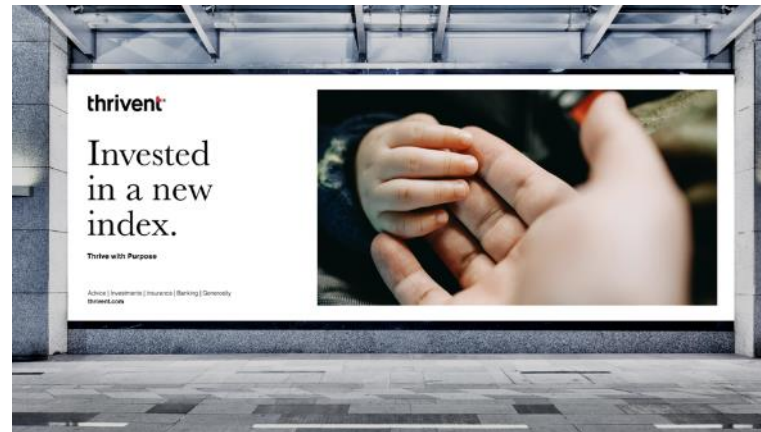
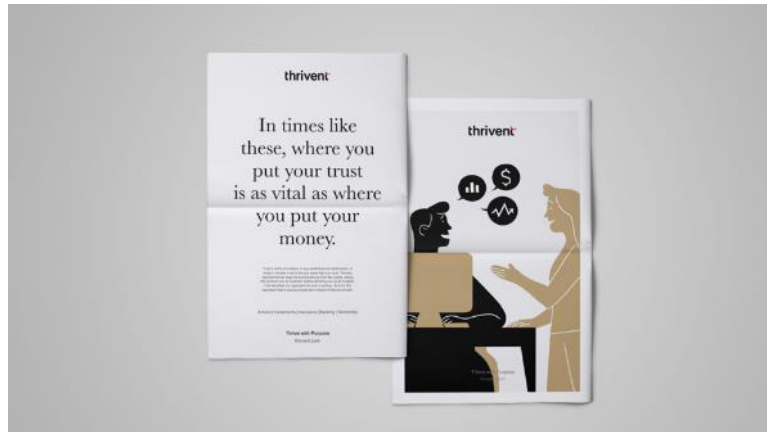
Workshops & Events

Our Unifying Idea

# Thrive With Purpose



# Launched national advertising campaign to generate interest and excitement with unprecedented scope that garnered recognition and results



# American Business Awards®

## Thrivent Earns Gold Stevie® Awards

The American Business Awards are the U.S.A.'s premier business awards program. All organizations operating in the U.S.A. are eligible to submit nominations – public and private, for-profit and non-profit, large and small.

Nicknamed the Stevies for the Greek word meaning “crowned,” the awards will be virtually presented to winners during a live event on Wednesday, June 30.

## 3,800 nominations

More than 3,800 nominations – a record number - from organizations of all sizes and in virtually every industry were submitted this year for consideration in a wide range of categories, including Startup of the Year, Executive of the Year, Best New Product or Service of the Year, Marketing Campaign of the Year, Virtual Event of the Year, and App of the Year, among others. Thrivent was nominated and won gold in the Marketing Campaign of the Year category for both Financial Products & Services and Insurance.

Marketing Campaign  
of the Year

Financial Products  
& Services



Marketing Campaign  
of the Year

Insurance



# Q&A



thrivent<sup>®</sup>