thrivent®
Asset Management

Managed Portfolios

Use managed portfolios to grow your practice

Financial professional benefits at a glance

+ Due diligence support
+ Outsource investment research and analysis
+ Save time for client engagement
+ Put our experienced team on your side

The trend of using managed portfolios is clear:

+ 90% of financial professionals say they have stronger client relationships, higher client retention and acquire more high-quality clients when they outsource[1]
+ Nearly $3 trillion of client assets in managed portfolios[2]
+ 92% of managed portfolio users agree that outsourcing improved their practice during COVID-19 volatile markets[3]

The Thrivent Managed Portfolios program offers solutions for outsourcing investment management through managed portfolios. Our managed portfolios are developed with extensive research and thorough monitoring so you don't have to spend the time building portfolios that are aligned with your clients' investment needs.

Better support for due diligence

Thrivent Asset Management® is continually conducting research into investment managers and strategies to confirm that the managed portfolios are competitive. Financial professionals who set up investments and forget them may find themselves under regulatory scrutiny. Thrivent Asset Management professionals take on the due diligence of keeping these portfolios well researched and competitive for you, lessening the time you need to do that work.

Outsource portfolio research responsibilities

Thrivent Asset Management Managed Portfolios are run by the Thrivent Model Portfolios Committee. This team is responsible for asset allocation decisions, investment product selection and portfolio construction. Financial professionals can access various documentation such as trade notices, quarterly commentaries and monthly performance reports. This helps provide confidence that each model adheres to a well-defined portfolio management process and risk profile. The Thrivent Model Portfolios Committee monitors risk levels, model drift and analyzes investment performance.

More time for client engagement

Since asset allocation decisions, portfolio construction, investment product selection and ongoing monitoring are performed by the Thrivent Model Portfolios Committee, you have more time to see clients and to grow your business. Portfolio review materials—including trade notices and quarterly commentaries—quickly provide you the rationale behind portfolio changes. The timely information updates make it easier for you to prepare for your client meetings and explain portfolio changes and results. With the Thrivent Model Portfolios Committee doing this work for you and your team, the time savings may even reduce the need for additional staff.

Experienced team

Thrivent managed portfolios are developed by a dedicated portfolio manager and research analyst who work hand-in-hand with Thrivent's Mixed Assets and Market Strategies team for strategic and tactical allocations. In addition, guidance comes from the Thrivent Asset Management Investment Strategies committee, which includes Thrivent Asset Management's most senior executives.

Client benefits at a glance

+ Confidence in investment strategies
+ Variety of investment options

Confidence in investments

Because you have a team of researchers, strategists and investment managers acting on your behalf, you have the time to address any client concerns due to market fluctuations, helping provide them confidence they want in their portfolio.

Variety of investment options

Thrivent offers a variety of managed portfolios to meet the varied time horizons, risk tolerance, income needs and goals of most investors. For example, Thrivent Income-Focused Managed Portfolios™ aim to provide income, Thrivent Faith-Based Managed Portfolios™ allow clients to integrate finances with faith and Thrivent SELECT Managed Portfolios™ seek growth for accumulation and range in risk tolerance from conservative to aggressive. The Thrivent SELECT Managed Portfolios also have models available for clients who can benefit from increased tax sensitivity.

Increased communication

Thrivent Asset Management provides continuous updates on the portfolios—including routine trade notices and quarterly commentaries—for more frequent and meaningful touch points with your clients.

Set up your back office help today.

800-521-5308 **sales@thriventfunds.com** **thriventmanagedaccounts.com**

[1]"AssetMark: What is a TAMP and how to choose the right one?" https://www.thewealthadvisor.com/article/assetmark-what-tamp-and-how-choose-right-one-0 (March 1, 2024)

[2]"America's Best Tamps 2024." WealthAdvisor. 2024. https://lp.tamps.com/ABT-2023.html (Feb. 8, 2024)

[3]"Which advisors had a smoother ride during COVID?" BlackRock. 2020. https://www.orionportfoliosolutions.com/wp-content/uploads/dlm_uploads/2021/02/WealthOutsourcingSurvey1Pager_Final_STAMPED__1__pdf_ibUK33mC.pdf (Feb. 8, 2024)

Investing involves risk, including the possible loss of principal. The prospectus and summary prospectus for the securities within the model portfolios contain more complete information on the investment objectives, risks, charges, expenses and other information of the fund, which investors should read and carefully consider before investing. To obtain prospectuses and summary prospectuses, contact your Regional Investment Consultant or call 800-521-5308.

Thrivent Asset Management, LLC's role is providing sponsors of managed accounts with non-discretionary investment advice in the form of model portfolios. The implementation of or reliance on a model portfolio is at the discretion of the managed account sponsor. Thrivent Asset Management, LLC is not providing personalized investment advice or investment recommendations and will not make any representations about the suitability of a model portfolio for any investor. The information provided is also not intended as a source for tax, legal or accounting advice. Please consult with a legal and/or tax professional for specific information regarding your individual situation. Thrivent Managed Accounts information is intended for use only by third-party adviser firms in conjunction with their management of their clients' accounts. The information about the Thrivent Managed Accounts is confidential and should not be disclosed, copied or used for any other purpose. Thrivent Asset Management, LLC does not have investment discretion over, or place trade orders for any portfolio derived from this information.

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