Your Community Foundation Fund Advisor Portal

As a Fund Advisor at the Community Foundation, you can easily access information about the funds you manage online, anytime, anywhere.

Getting started:

Your username and password will need to be updated.
The Community Foundation emailed all fund advisors an invitation and instructions to create a new password to the Fund Advisor Portal site. (If you don't see our email in the inbox associated with your account, please check your spam or junk folder.) From that email, select the link, and you will be prompted to create your password to the Portal site. Once your password is created, go to the Portal, enter your credentials, and log in.

- Your Username is your email address associated with your account.
- Your new secure password must contain:

  - A minimum 12 characters
  - At least one lower <u>and</u> one upper case letter
  - At least one special character like @ $ %.
  - Do not use consecutive numbers like 123

If you did not receive these instructions, email our **portal help team**.

After You Log In

Once you've logged in, select the tabs at the top of the page to view the different types of information available. Your screen will look like this:

Profile

John and Jane Doe Advised Fund (Test 1)

Foundation Contact Shelly Leadley
sleadley@cffoxvalley.org

| Home | Choose Fund | Contributions | Grant History | Grant Recommendatons | Fund Statements | Donate | Logout |

Current Balance: $518,000.21

Fund Advisors are: Doe, John

Recent Contributions				Recent Grants				
⇕ Date	⇕ ID	⇕ Contributor	⇕ Amount	⇕ Date	⇕ ID	⇕ Status	⇕ Recipient	⇕ Amount
10/19/2022	115873	Doe, John	543,000.21	10/18/2022	60862	Approved	TEST NPO	25,000.00

If you are listed as a Fund Advisor for only one Fund, you will go directly to the home page for the Fund. If you serve as a Fund Advisor for multiple funds, you will see the "Choose Fund" menu:

Choose Fund

John and Jane Doe Advised Fund (Test 1)

John and Jane Doe Designated Fund (TEST 3)

John and Jane Doe Scholarship Fund (TEST 2)

Choose the fund with which you wish to interact.

Easy Navigation

From the home page, you can select the tabs at the top of the page to review informational areas:

John and Jane Doe Advised Fund (Test 1)

Home   Choose Fund   Contributions   Grant History   Grant Recommendatons   Fund Statements   Donate   Logout   Export

Home - A summary of your fund's current balance plus the spendable balance, if applicable. It also shows a list of your total contributions and total grants. The pie charts show your fund's top 10 contributors (if applicable), and top 10 grantees. (Scholarship funds will say $0, but you can view payments on the grant history tab.)

Contributions - A list of contributions or donations to your fund since January 1, 2010. (For fund history prior to that, please email your Community Foundation contact by clicking the link in the upper right corner.) Clicking on a contributor's name will bring up the contribution detail. You can export this information into an Excel spreadsheet by clicking on the Export tab.

Grant History - A list of grants made from your fund since January 1, 2010. (For grant history prior to that, please email your Community Foundation contact.) Clicking on the grantee name will display the history. You can export this information into an Excel spreadsheet by clicking on the Export tab.

Grant Recommendations - A list of grants you've made in the past, along with an easy way to make a new grant to an organization or to another fund held at the Community Foundation. You can recommend a grant using one of four methods:

1. Select a grantee you've given to in the past from the drop-down menu and fill in the amount.

2. Search for Other Grantees from a dropdown menu.

3. Search for a nonprofit by using the search bar. Enter keywords such as the organization name.

4. If you can't find the organization using the search feature, you can manually enter the name of the organization, including the mailing address and phone number, and submit your request for approval.

Once you submit your request, the Community Foundation will process your grant and notify you. When the grant has been completed, it will also appear in this tab.

Fund Statements- View or download a current or past fund statement(s).

Donate – Donate to your own fund(s) or make a gift to one of the many funds held within the Community Foundation funds via credit card. To return to your fund view, click the Home tab.

Export – Download the fund's contributions and grant history using this tab.

Logout - End your current online session.

Manage your Profile information

- Click the profile link in the upper-right area of ~~your~~ Fund Advisor Portal to change your password. Click the Save button to keep the changes.

- To update your mailing address, phone number, or other household contact information, email your Community Foundation fund contact using the link in the upper right corner of your screen.

Locked out?

Click **Forgot Password** on the login page. Enter your username (the email address associated with your account) and click the Reset Password button. If an account with that username is found, instructions will be sent to the email address we have on file.

If you're still having trouble, **email our portal help team** and we can reset your login information.