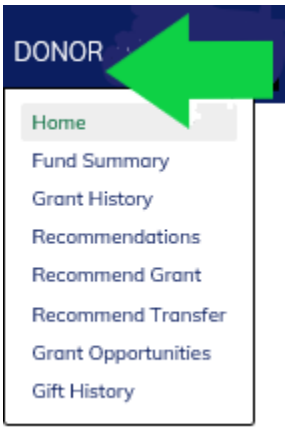
TIPS FOR USING YOUR ONLINE DONOR PORTAL ACCOUNT



HOME

The "Home" Screen is a dashboard of your fund.

Grant Opportunities: This screen only appears on the "Home" dashboard.

The Catholic Foundation may refer grant needs that cannot be fulfilled by current foundation funding from time to time to donor advised funds and their advisors for consideration. Referrals may be made when there are urgent needs expressed to the foundation. Such grant opportunities will be listed here.

FUND SUMMARY

Your Fund Summary is an online snapshot of all philanthropic activity, which has posted to your fund as of today. Quarterly investment results and market values are posted to all funds quarterly during the month following the end of each calendar quarter.

The fund balance is comprised of your gifts, grants, transfers, investment activity, and fund expenses. The balance of your fund should be used as a guideline—not as an exact figure—when recommending grants.

You will continue to receive fund statements by email that show your fund's performance over a specified period of time.

GRANT HISTORY

Your grants history lists all grants distributed by your fund, including the date and amount. Click on the heading to sort by *Recipient*, *City*, *Date*, or *Amount*.

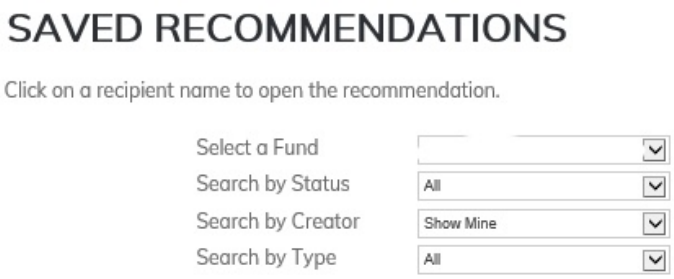
Searches can be done by *Year* or *Recipient* name.

To use a past grant as the basis for a new request, select the box then click the button at the bottom "Create a grant recommendation based on the selected grant".

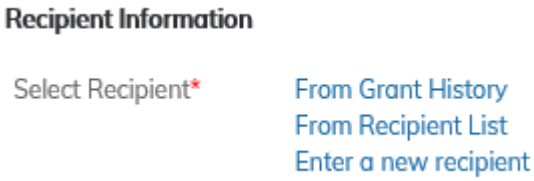
RECOMMENDATIONS

Saved Recommendations:

Any grants that have been saved in the system, but not yet submitted, can be quickly located here as shown:

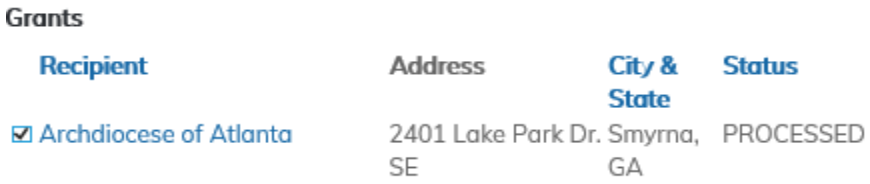


RECOMMEND GRANT



- **From Grant History:**

  If you have made previous grants to an organization use the"Grant History" option.

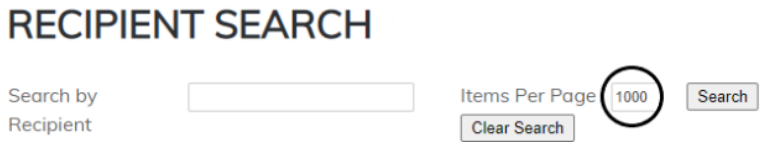


  Check the organization box, then press "Add selected recipient to grant recommendation", then complete the grant amount and other required fields.

  Remember to hit the "Submit" button to complete your transaction.
  Use "**Save"** if you need to leave and come back to the grant or it will be lost.

- **From Recipient List:**

  Search the "From Recipient List" option if an organization was not found in grant history to see if the organization is already in our system. You may also find that there are many other organizations that are of interest to you. Increase the Items per Page to 1,000 in order to view a list of all the recipients.



  After selecting the box for the located organization, check the box (as shown below), press, "Create a grant recommendation based on the selected grant" at bottom of the page.

- On "Grant Recommendation" screen, complete the grant amount and other required fields.

  Remember to hit the "Submit" button to complete your transaction.
  Use "**Save**" if you need to leave and come back to the grant or it will be lost.

- **Enter a New Recipient:**

  If not found, use the option "Enter a new recipient" to make a new grant recommendation.

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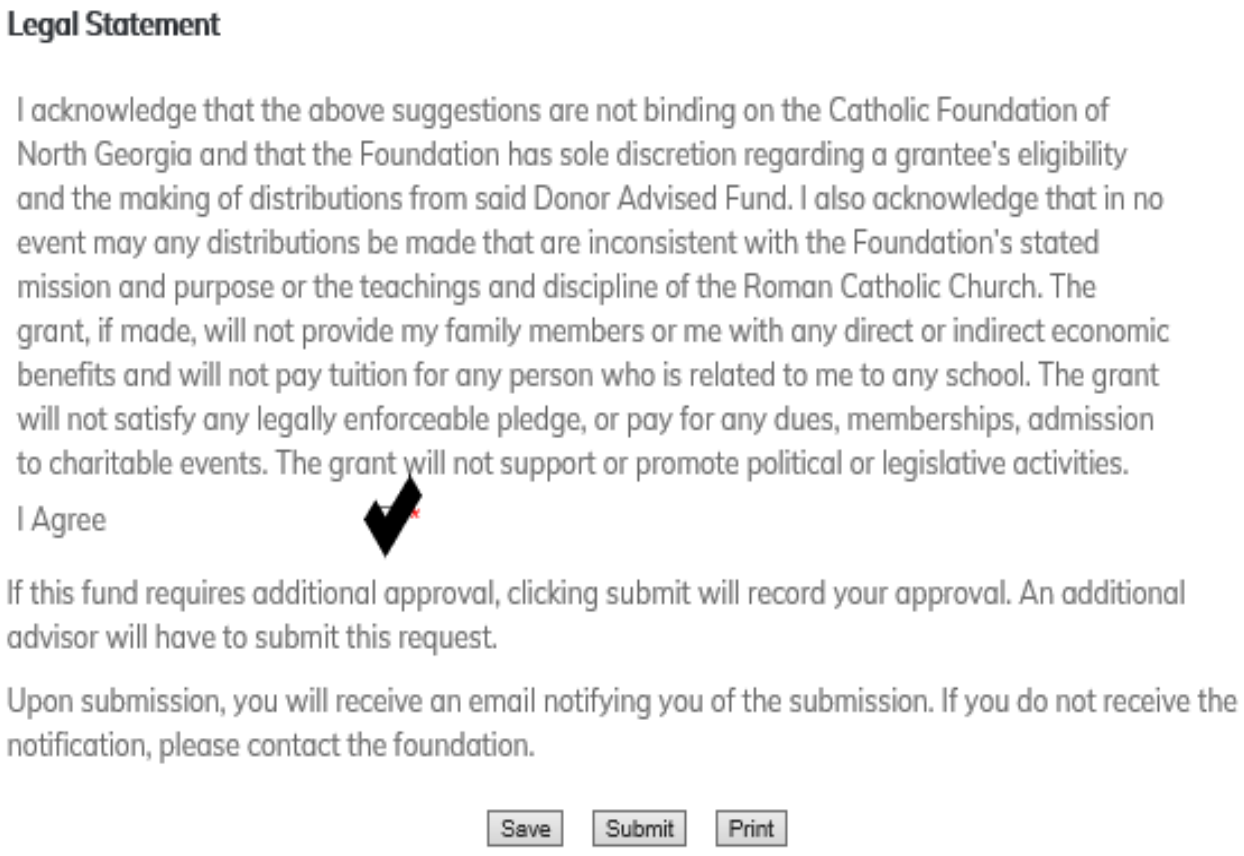
Remember to hit the "Submit" button to complete your transaction.
Use "**Save**" if you need to leave and come back to the grant or it will be lost.

- **Grant Eligibility:**

All grants are to be used for charitable purposes only. They must be consistent with the Foundation's stated mission and purpose or the teachings and discipline of the Roman Catholic Church and IRS guidelines. For each grant request, you will need to acknowledge and agree to the Legal Statement.

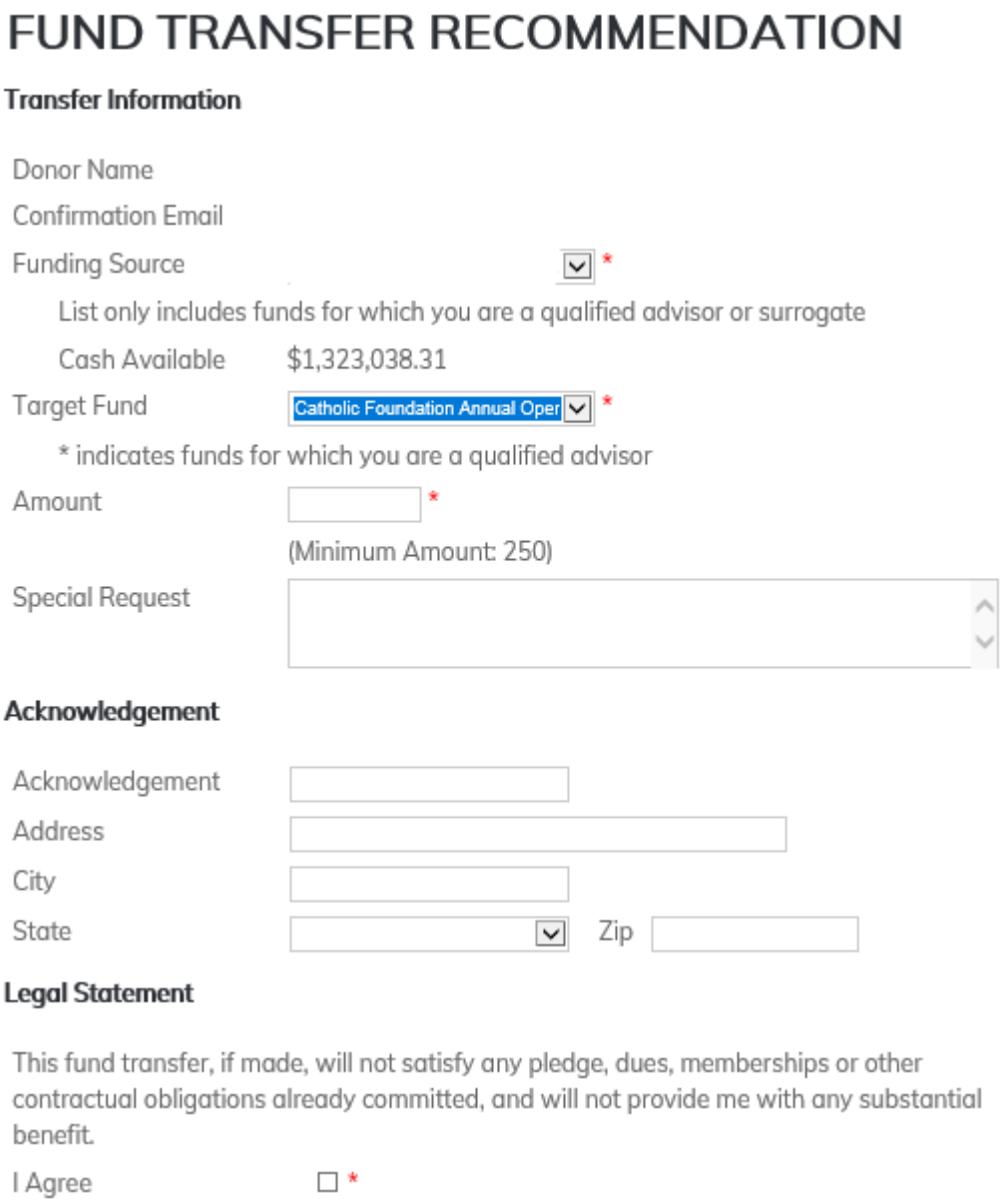


RECOMMEND TRANSFER

Recommend a Transfer:

This may be used if you want to support the Catholic with a donor advised fund grant to the ***Catholic Foundation Foundation Annual Operations***. You can also use this option to give tp one of the funds used to support the Catholic Community grants program.

Lastly, the "*Fund Transfer Recommendation"* is for interfund transfers. This is designed for donors with multiple funds and can be used if you want to transfer money from one of your funds to another.



FUND TRANSFER RECOMMENDATION

Transfer Information

Donor Name

Confirmation Email

Funding Source *

List only includes funds for which you are a qualified advisor or surrogate

Cash Available $1,323,038.31

Target Fund Catholic Foundation Annual Oper *

* indicates funds for which you are a qualified advisor

Amount *

(Minimum Amount: 250)

Special Request

Acknowledgement

Acknowledgement

Address

City

State Zip

Legal Statement

This fund transfer, if made, will not satisfy any pledge, dues, memberships or other contractual obligations already committed, and will not provide me with any substantial benefit.

I Agree *

GIFT HISTORY

- "Gift History" option will show you recent gifts to your fund.
- If you want to add money to your fund, click "Give Now" at the top of the screen and click on ***Donor Advised Funds*** to locate your named fund.

- If you would like to contribute stock, click here: Stock Transfer Instructions.

If you need to know any information that is not available through the Web Portal account, please do not hesitate to contact us at 404-497-9440.

Thank you,

(Updated November 12, 2020)

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