

Using Your Online Fund Advisor Portal



We are introducing a new and improved online fund advisor portal. With the new portal, you can view your fund statements, fund balance, and continue to make grant recommendations.

Initial Login Process & Account Set Up

1. CFNGA will send you a link to access the **new portal** via email. Once you receive the email please select the link. Use the email address that we emailed as your username.
2. Next you will select – **LOGIN WITH EMAIL**

A screenshot of the login page. It has a title "Login" and two input fields: "Username" and "Password". Below these is a blue "LOGIN" button. A green circle highlights the "Login with email" link below the button, with the text "Forgot your password?" underneath it.

3. Enter your email address and select **LOGIN**. The system will email you a **6-digit pin number** to use to log in.

NOTE: There are two options for continued logins.

- 1) Select **SECURITY** on the left menu,

PERSONAL INFORMATION

SECURITY

INTEREST TYPES



ENABLE

then Click the button to receive a pin each time you login

A screenshot of the "Verify your pin" screen. It has a title "Verify your pin" and a light blue message box that says: "An email has been sent to the email provided. It contains a PIN which will be valid for up to 3 minutes. Check your spam or junk folders if you do not receive the email." Below the message is a "Pin" input field with a green circle around it. At the bottom is a blue "LOGIN" button and a link "Login with email".

Select 2-Step Verification Method

- ☐ Use authenticator app
- ☐ Email pin to [redacted]
- ☐ Email pin to [redacted]
- ☐ Text pin to 404-497-9440

OR

- 2) To create your own unique password select PROFILE button in the upper right corner



Next select [SET PASSWORD](#) and this will be the password you will use moving forward. Please be sure to save it in a safe space. If you forget it and need to reset, you can select *Forgot your Password*.

4. Under Profile, you can edit your contact information by selecting [EDIT INFORMATION](#).

You may edit information such as your address, phone and philanthropic interests. Please contact the Catholic Foundation to change your email address.

5. On the Left side, please click on "Interest Types", click Edit Information (right side tab), then select the philanthropic areas that matter most to you. This will help us connect you with funding needs that align with your interests. [SAVE](#)

6. You will also be able to login to the portal from the [CFNGA Website](#) by clicking the button

[Log In](#)

7. If you are locked out of the portal, click "*Forgot Password*." Enter your username, then click the "*Reset Password*" button. An email will be sent to your email address for that account. If you are still having trouble, please contact us.

Tips for using the new Fund Advisor Portal

Once you log in, you will be on the Fund Home page. If you are an advisor of multiple funds with CFNGA, Click [SELECT](#). From there you can select the tabs (located on the left side) for the informational areas that are available to you. You will also see a dashboard for your fund.

Tab Summary

- **MY FUNDS** - A summary of the fund's current balance which includes contributions and grants made. The *current balance* is an estimated balance not considering current quarter activity (i.e. investment gains, losses and fees). This statement appears on every tab. Or use the drop down to **Choose a Fund**, if you are an advisor of multiple funds.
- **DONATIONS** - Shows all contributions or donations to the fund.
- **PREVIOUS GRANTS** - Shows a grant summary and grant history of the fund. Click on the grantee for additional details of the grant(s). You can **COPY** a past grant and edit it to make an additional grant request OR select the **Create Grant Request** button in the upper right to request a grant to an organization not listed or to a CFNGA fund.
- **NEW GRANTEES** - As a fund advisor you can create grant requests to a nonprofit, parish or school not listed in your history, or to a CFNGA fund.
- **FUND STATEMENTS, FILES, AND FINANCIALS** – A walkthrough guide and other files from the Catholic Foundation can be found here. **This is the location of quarterly fund statements for your donor advised fund.**
- **DONATE** – This tab takes you to the online donations page where you can add funding using a credit card or ACH payment to your donor advised fund or donate to another fund at the Catholic Foundation.

MY FUNDS

DONATIONS

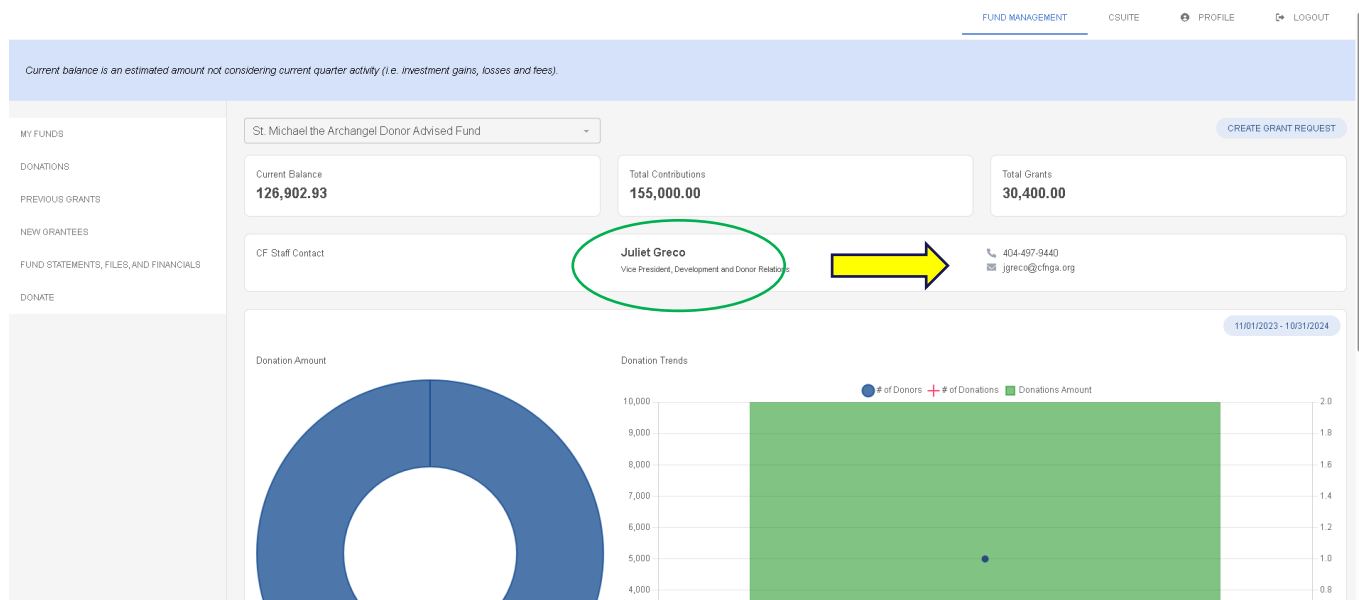
PREVIOUS GRANTS

NEW GRANTEES

FUND STATEMENTS, FILES, AND FINANCIALS

DONATE

My Funds Tab



The Catholic Foundation of North Georgia staff can help walk you through anything with your Fund Advisor Portal. You will see one of our staff members assigned as your staff contact when you login to the portal. We are available to guide and assist you with anything you may need.

Contributions Tab

Shows all contributions or donations to the fund.

Donations

10 entries per page

Search:

[EXPORT](#)

ID	Date	Contributor	Type	Description	Amount
18299	12/29/2023	Fortune, Mr. James R.	Check		10,000.00
9916	12/28/2022	Fortune, Mr. Jamie and Mrs. Emma	Check		5,000.00

- Shows all contributions made to your donor advised fund.
- Click on the contributor hyperlink for additional details of the contributor(s).
- Click the [EXPORT](#) button to download a record of contributions to your fund.

Grants Tab

Grant Summary Tab

[GRANT SUMMARY](#) [GRANT HISTORY](#) [RECURRING GRANTS](#)

Select a grantee from the menu, then choose [COPY](#) to repeat a previous grant

- Minimum grant distribution is \$250
- **Please attach information to make grant payment via ACH or give contact email**
- Completed submissions are processed weekly at the beginning of each week
- GRANT HISTORY Tab - Can also select a past grant to COPY and edit
- Please do not enter information in all caps

Grant Summary

10 entries per page

Search:

Grantee	Grants	Amount
Catholic Foundation Annual Operations	2	3,500.00
Catholic Relief Services	1	400.00

1. Shows a summary of the grants given to organizations.
2. Click on the grantee for more details on the grant.
3. If you would like to repeat a grant, click the blue [COPY](#) button. This will pre-fill the **Grant Request** screen and allow you to preview the grant and make any needed changes. Please **add contact information and the grant purpose in the description**.
4. We make grant payments via ACH and it is often difficult to find contacts for organizations. Your assistance would be appreciated. You may attach documents as well which are then stored under the Files tab.

Grant History Tab

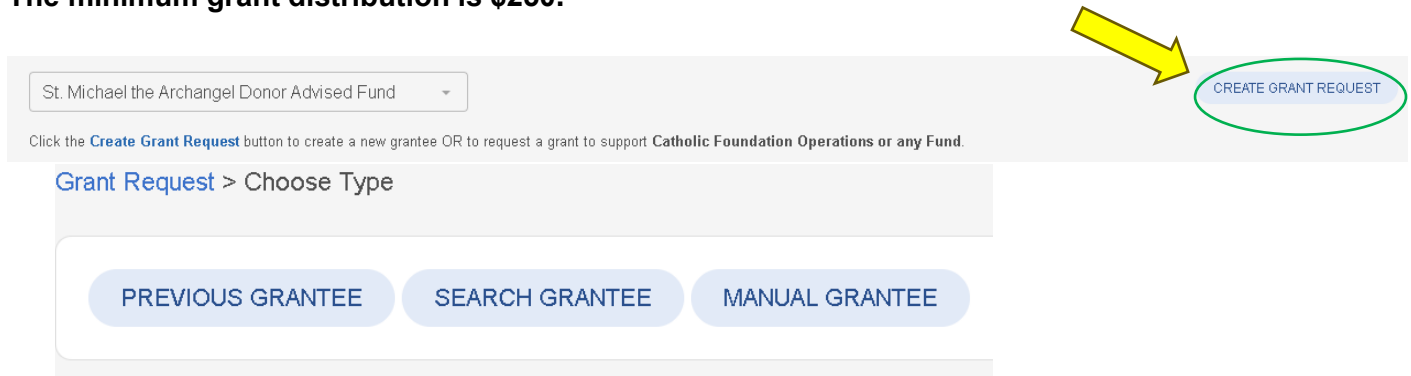
1. Shows the grant history of the fund, listing each individual grant made from the fund.
2. Click on the grant ID number(s) for more details on the grant. If you would like to repeat a grant, click the blue **COPY** button and make any needed changes. Please **add contact information and the grant purpose in the description**.

Recurring Grants Tab

- You may add recurring gifts to send quarterly, semi-annually, or annually. *However, we are unable to process monthly grant requests.*

Grant Request Tab

The minimum grant distribution is \$250.



St. Michael the Archangel Donor Advised Fund

Click the **Create Grant Request** button to create a new grantee OR to request a grant to support Catholic Foundation Operations or any Fund.

Grant Request > Choose Type

PREVIOUS GRANTEE SEARCH GRANTEE MANUAL GRANTEE

1. **Choose from PREVIOUS GRANTEE**
Previous grantees and funds that you have given to in the past can be selected from drop down lists. Select and enter grant information.

OR

2. **Search for Other Grantees**
You can type in keywords and click **Search** to see if the organization is already in the database.

OR

Choose from previous Grantee
Grantees you have given to in the past
Foundation funds you have given to in the past
Other foundation funds

Search for other Grantees	
Name	Rectangular Snip
City	
State	Search

3. **Enter Grantee information manually**

Add a *new* nonprofit or grantee manually *if not found*. Required information is marked with a red asterisk. Click 'Submit' to go to the next screen, where you will be able to enter the grant description, tax ID, and other information, such as where to direct the letter on the second screen.

The form is titled "Enter Grantee information manually". It contains several input fields, each with a red asterisk indicating required information: Name, Address (two lines), City, State, Zipcode, Phone, and Email. Below the fields is a small text label "* required information". At the bottom right is a blue "Submit" button.

- You can add several grant requests at a time. The grantee, description, and amount will be displayed. Once you have added the grant request(s) you desire, click the **Review** button. Please ensure the information displayed is accurate.

Review

The form is titled "Grant Request". It displays the following information: Grantee (Test Org), Description (with a character count of 0/255), Amount, Anonymous (checkbox), Recurring (checkbox), Attachment (Choose Files button, No file chosen, and a note to drag and drop), Attachment Description, and a section for new grantees to add Tax ID and other notes. At the bottom left is a blue "Review" button.

- Once the grantee information has been added click

Add To Grant Requests

- By clicking **Submit Requests** you are acknowledging the following statement for each grant:

By clicking submit, I acknowledge that in no event may any distributions be made that are not consistent with the Foundation's stated mission and purpose or the teachings and discipline of

the Roman Catholic Church. The grant(s), if made, will not provide my family members or me with any direct or indirect economic benefits and will not pay tuition for any person who is related to me to any school. The grant(s) will not satisfy any legally enforceable pledge, or pay for any dues, memberships, or admission to charitable events. The grant(s) will not support or promote political or legislative activities.”

Once submitted, the new grant request(s) will show up in your grants list.

Grants					
✦ Date	✦ Status	✦ Recipient	✦ Description	✦ Amount	✦
05/02/2023	Request	Atlanta Hope Center	fighting homelessness	500.00	Cancel

Grant requests still in the “**Request**” status can be deleted from this screen. Just click  to the right of the request.

Fund Statements, Files, and Financials Tab

FUND STATEMENTS
FILES
FINANCIALS

Statements



- We will be transitioning from emailing fund statements to utilizing the portal to access them for ease and efficiency.
- Your fund statements will be listed under the **FUND STATEMENT** tab
- You will receive an email informing you when your statement has been uploaded and is available to view. You can log in at any time to review your balance and statements.
- You may generate any past statement by clicking the **MANUAL STATEMENT** button and entering the quarter start date.
- Please note that the statements will have a new look utilizing new software.**

FUND STATEMENTS
FILES
FINANCIALS

Manual Fund Statement

Statement Type

☐ Monthly
☐ Quarterly
☐ Yearly
☒ Custom Date Range

Start Date

Start Date

03/31/2024

CREATE

Donate Tab

- On this screen you may donate online to add funding to your donor advised fund or another fund at the Foundation.
- This donate page requires a credit card or ACH payment.** To request a grant from your donor advised fund to another fund at the Foundation, please use the **Grant Request** tab to request a grant.
- You may also search for a fund using keywords or click on ‘show all funds list’ to find the fund you wish to donate to.

Other Funds

Search

[show all funds list](#)

Assistance

If you need to know any information that is not available through the Fund Advisor Portal, please do not hesitate to contact us at 404.497.9440. Thank you for allowing the Catholic Foundation to manage your donor advised fund. We are excited to offer the new improved online portal to better serve your needs.

Thank you.

Catholic Foundation of North Georgia Staff