



Any donor. Any gift. Any charity.

Renaissance Charitable Foundation

Renaissance Charitable Gift Fund

8910 Purdue Road, Suite 555

Call: 866-803-0389, Email: rcf@reninc.com

DONORFIRSTX DONOR USER GUIDE



Any donor. Any gift. Any charity.

IMPACT PAGE

QUICK GUIDE

DESCRIPTIONS

QUICK LINKS

Time is valuable so DFX has quick links for the most common actions — recommending a grant, reviewing grant history, viewing investment details, and downloading forms and statements.

ACCOUNT DETAILS

Click to expand for full details on a fund.

CHARITABLE IMPACT

DFX shows donors the impact of their giving by breaking down grants into philanthropic categories.

RECENT TRANSACTIONS

Listed are the three most recent contributions and grants for a fund. Click on any transaction to dive deeper into the details.



Switch ISP Logged in as: Staab, Greg ? Log Out

The Mr. Fred Rogers Family Charitable Fund

\$123,950.80
ACCOUNT VALUE

Account Details Contributions Grants Investments Forms Statements

Account Detail



Welcome to Your Online Account Information

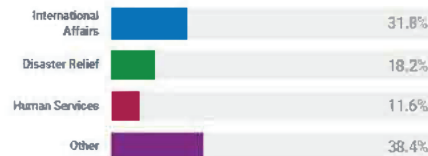
We applaud you for making a difference! The Renaissance Charitable Donor Advised Fund provides you with online resources to help you build your legacy and allow you to give more over time to the charitable causes you wish to support. Working together, we can build a better world.

ACTIVE

The Mr. Fred Rogers Family Charitable Fund

VIEW ACCOUNT DETAILS

GRANT CATEGORY



Your Charitable Impact

Your giving has real impact! Here's how your grants are supporting the causes you care about most.

RECENT CONTRIBUTIONS

12/27/2016	Suntrust Banks Inc	\$23,745.94
12/23/2016	Suntrust Banks Inc	\$27,325.57
12/21/2011	Suntrust Banks Inc	\$20,070.00

View All

RECENT GRANTS

09/04/2018	Oxfam-America, Inc.	\$300.00
08/21/2018	Children's Defense Fund	\$2,000.00
08/02/2018	Mercy Corps	\$5,000.00

View All

Contact Us

If you have any questions or comments, please contact us at 866.803.0389.



ACCOUNT STATEMENT

DESCRIPTIONS

DATE

Date shows the quarter to which the statement applies.

FUND INFORMATION

Fund information shows the name of the fund, the fund's code, and the fund's account number.

ACCOUNT SUMMARY

Account summary shows the balance of the account at opening and close of the statement's quarter.

You will see a summary of account activity over the course of the quarter.

ACCOUNT HOLDINGS

Account holdings provides a breakdown of the beginning and ending balances for underlying investments within the fund.

CONTRIBUTIONS TO ACCOUNT

A detailed listing of contributions and grants within the account during the quarter are listed in 'Contributions to Account' and 'Grants from Account'.

Account Statement

October 1, 2017 - December 31, 2017

The Charles Walters Family Fund

Account Code: WALTER99

Account Number: 50000

Charles Walters
400 N. Main St.
Brownsville, TX 77801

To access your online account information, visit us @ <https://xyz.donorfirstx.com>.

Account Summary

Beginning Balance (October 1, 2017)	\$0.00
Contributions to Account	\$51,192.00
Grants Paid from Account	(\$8,575.00)
Market Value Changes	(\$351.00)
Interest and Dividends	\$0.00
Realized Gains (Losses)	\$0.00
Account Fees	\$0.00
Ending Balance (December 31, 2017)	\$42,266.00

Account Holdings

Description	Beginning Balance	Change in Account Balance	Ending Balance	% of Account
Bristol Myers Squibb Co	\$0.00	\$11,437.00	\$11,437.00	27.06%
Lowes Cos Inc	\$0.00	\$12,642.00	\$12,642.00	29.91%
Nike Inc Cl B	\$0.00	\$18,187.00	\$18,187.00	43.03%
Total	\$0.00	\$42,266.00	\$42,266.00	100.00%

Contributions to Account

Date Received	Description	Quantity	Amount
12/28/2017	Bristol Myers Squibb Co	200.000	\$13,781.00
12/28/2017	Nike Inc Cl B	350.000	\$22,169.00
12/28/2017	Lowes Cos Inc	200.000	\$15,242.00
Total			\$51,192.00





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RECOMMEND A GRANT

DESCRIPTIONS

GET STARTED

Access the grant recommendation screen through the quick link or main navigation.

SELECT GRANT ADVISOR

Select the listed grant advisor for the account who will be recognized as the individual recommending the grant.

SELECT GRANT RECIPIENT

Choose from your favorite charities, manually enter information, or search GuideStar to select your grant recipient.

ENTER THE GRANT AMOUNT

Be sure you meet the minimum indicated to the right of the box.

GRANT TIMING

Process your grant immediately, on a future date, or create a recurring grant schedule.

Please note that a future date selection indicates the date the grant review will begin and not the date of payment.

RECOGNITION

DFX allows you to choose how you are recognized for the grant. Issue it in the name of the fund, the primary donors, or a special recognition in honor of someone. Grants can also be issued anonymously.

DashboardAccountsContributionsGrantsAllocationsPayeesUsersReportsMisc

The Mr. Fred Rogers Family Charitable Fund

Recommend a GrantPlan a ContributionSchedule a Transfer

\$73,087.86ACCOUNT VALUE

Account DetailsContributionsGrantsInvestmentsFormsStatements

Recommend a Grant for ABC Family Donor Fund (24694)

Back to Previous Page

GRANT DETAILSPREVIEWSUBMITTED

123

Fields marked with * are required.

SELECT THE GRANT ADVISOR

☐ Mrs. Jane Doe

☐ Mr. John Doe

SELECT THE GRANT RECIPIENT

Favorite grant recipients

Previously approved grant recipients

Search approved grant recipients

Search GuideStar

Manually enter grant recipient

Contact Name:

Contact Phone:

(xxx) xxx-xxxx

Address 1: 2025 E St NW

Address 2:

City*: Washington

State: DC

Zip: 20006

PREVIOUS GRANTS 1

ENTER THE GRANT AMOUNT

Enter the amount of the grant below \$73,087.86

☐ Grant Amount: \$5,000.00Minimum amount: \$250.00

☐ Account Closing Grant *

* The account will be fully liquidated and net proceeds will be sent to the grant recipient. Account closing grants may require additional processing time.

SELECT THE GRANT TIMING

What type of grant would you like to recommend? *

☐ One time grant to be processed immediately

☐ One time grant to be processed on a future date

☐ A recurring grant

☐ Installment grant (multi-year grant commitment)

SELECT THE GRANT RECOGNITION

How do you want to be recognized?

☐ Include the following:

☐ Name of the Account

☐ Special recognition:

Select a Recognition

Add address information to this recognition.

☐ Recommended by:

Select a Recognition

Didn't find what you're looking for? Select "Add New..."

☐ Issue the grant anonymously



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RECOMMEND A GRANT

DESCRIPTIONS

GRANT PURPOSE

Would you like the funds to be restricted to a specific purpose? You can do so by entering it here.

Please note that some special purposes may require additional review.

ACKNOWLEDGEMENT & NEXT

Read and acknowledge the terms for the grant. Clicking Next confirms your recommendation is complete and ready to be processed.

QUICK EDITS

Edit the amount of your grant, grant recipient, the timing, recognition and purpose by clicking the pencil icon.

ADD ANOTHER GRANT

Clicking the Add Another Grant button allows you to recommend additional grants in one transaction.

SUBMIT

When ready, submit all grants for processing.

SUCCESS & STATUS

Once grants are submitted, a third and final screen confirms they are being processed.

The status bar reflects the total number of grants currently submitted for processing. This number includes all grants submitted to date that are not yet processed.

GRANT PURPOSE

- ☒ The grant purpose is unrestricted
☐ There is a special grant purpose:

Special instructions not to appear on the letter:

ACKNOWLEDGEMENTS AND SUBMISSION

I have read and agree to the terms below:

- ☒ I affirm that all information in this form is true to the best of my knowledge, and that neither I nor my family will benefit in any way from this grant.
☒ I understand that this information represents a grant recommendation that I am making to the sponsor of my account a not a final grant decision.

Next >>

GRANT DETAILS

PREVIEW

SUBMITTED

Almost finished! Please review the grant recommendation information below prior to submission.

Key: = Edit* = Cancel = View

* = Edit can only be completed by the person that made the recommendation.

Deselect All

Select All

USER	RECIPIENT	AMOUNT	TIMING	RECOGNITION	PURPOSE
Contains...	Contains...	Contains...	Contains...	Contains...	Contains...
Brandon M. Hamrick	American Red Cross 2025 E St NW Washington, DC 20006	\$5,000.00	One time grant	ABC Family Donor Fund	Unrestricted

Total amount for grants listed: \$5000.00

Cancel All

Submit

Add Another Grant

There is 1 preliminary grant currently waiting for submittal.

GRANT DETAILS

PREVIEW

SUBMITTED

There is 1 grant currently submitted for processing.

DESCRIPTIONS

DOCUMENTS TAB

Clicking the Documents tab will take you to the Documents report page.

YEAR

Documents are available based on the applicable year.

GRANT LETTER

View grant letters sent to charities with processed grants.

CONTRIBUTION LETTER

Contribution letters can be used to supplement the donor's tax preparation.

STATEMENTS

View quarterly statements for the account.

[Back to Account Summary](#)

Mr. Fred Rogers Family Foundation

[Change Account](#)

[+ Add a Fund](#) [♥ Recommend a Grant](#) [📄 Plan a Contribution](#)

\$123,950.80

FUND VALUE

\$123,950.80

GRANTABLE BALANCE AS OF 8/19/2020

[Fund Details](#) [Contributions](#) [Grants](#) [Investments](#) [Documents](#)

Documents

Year: 2020

[Manage Statements](#)

GRANT LETTER

• [Grant Letter](#)

CONTRIBUTION LETTER

• [Contribution Letter](#)

WELCOME LETTER

• [Welcome Letter](#)

STATEMENT

• [Test Statement](#)



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USER SETTINGS

QUICK GUIDE

DESCRIPTIONS

USER PREFERENCES

Hover over your name to change your email, password, email security questions, and to customize email notifications.

CHANGE PASSWORD

Change your password with the parameters set up by the organization.

CHANGE SECURITY QUESTION

Update the security question to log in to your account if you lose your password.

UPDATE EMAIL NOTIFICATIONS

Opt-in to receive e-notifications regarding account activity.

Moncreiff, Aaron Log Out

- Change Email
- Change Password
- Change Security Questions
- Email Notifications

Enter Your Current Password *

Create Your New Password *

Confirm Your New Password *

Your password must meet these minimum requirements:

- ☐ Must be a minimum of 6 characters in total length
- ☐ Must be a minimum of 1 capital letters
- ☐ Must be a minimum of 1 lower case letters
- ☐ Must be a minimum of 1 numbers

Change Password

CHANGE SECURITY QUESTION

We do not have a security question and answer on file for you. You will need to provide them before continuing on.

* Security Question:
What is your Mother's maiden name? ▼

* Answer to the Security Question:

* Confirm Answer:

Accept Changes

UPDATE YOUR EMAIL NOTIFICATIONS

- ☐ Contribution Information Submitted
- ☐ Contribution Received
- ☐ Grant Approved
- ☐ Grant Paid
- ☐ Grant Recommendation Submitted
- ☐ Login Credentials Failures
- ☐ Login Credentials Success
- ☐ New Account Submitted

Save Changes