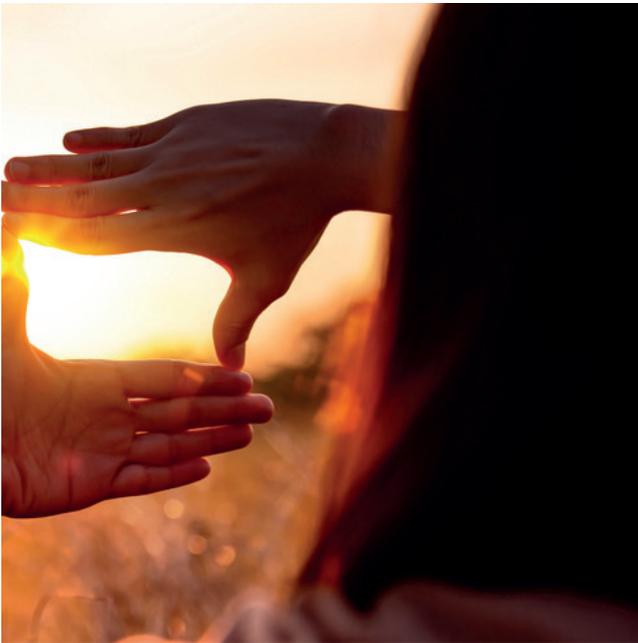
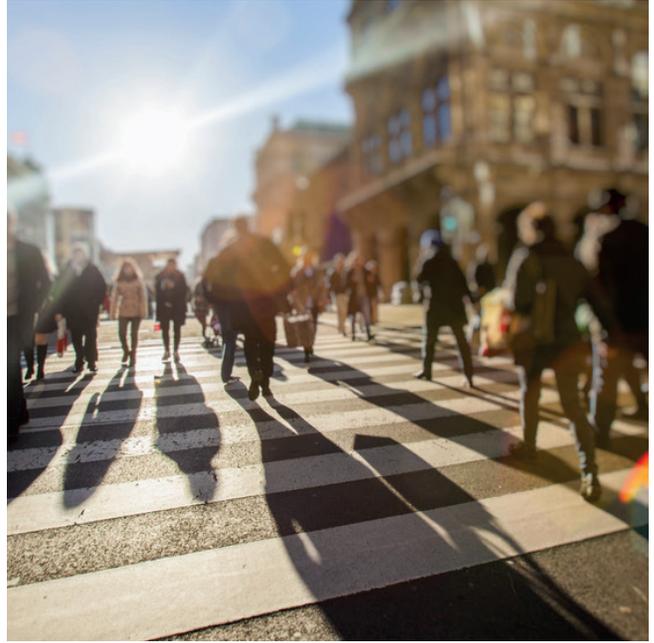


Donor User Guide



Donor User Guide

Descriptions

Quick links

Quick links are available for the most common actions; recommending a grant, planning a contribution or downloading forms.

Account details

Click to expand for full details on a fund.

Recent transactions

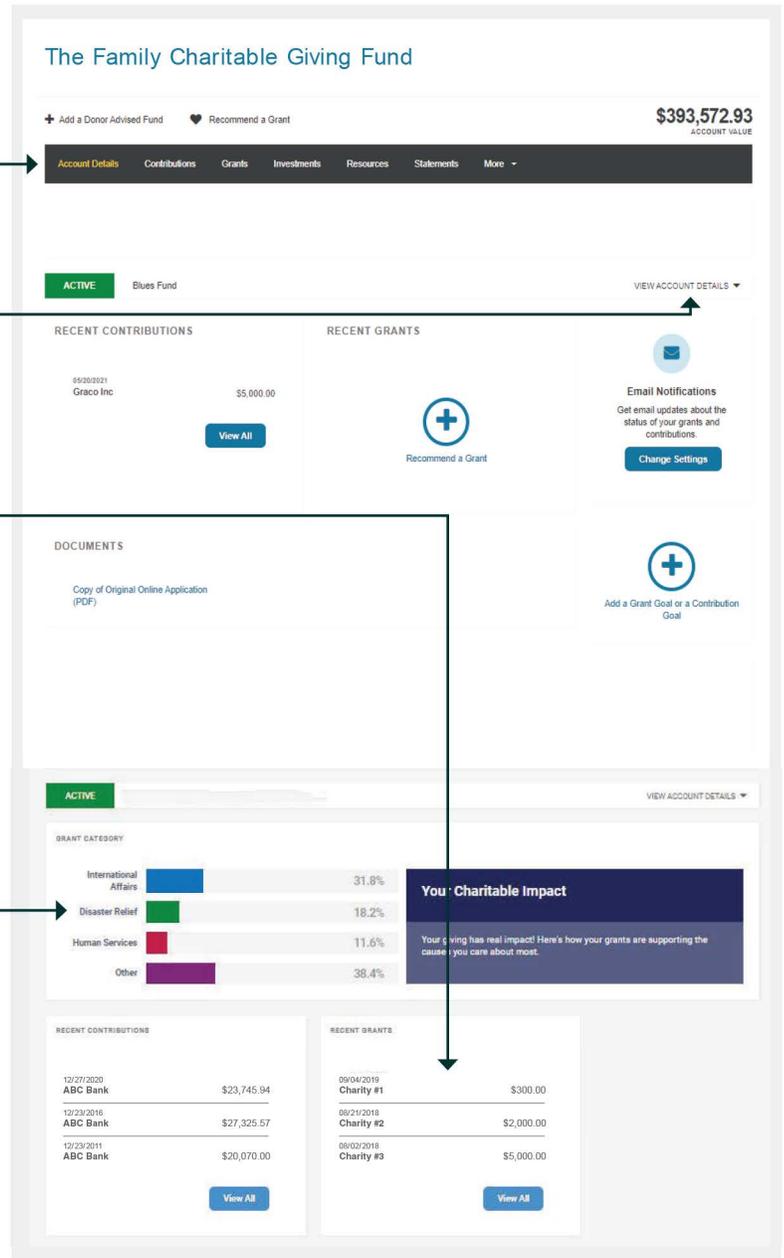
Listed are the three most recent contributions and grants for a fund. Click on any transaction for more details.

Charitable impact

DFX shows you the impact of your giving by breaking grants into philanthropic categories.

Questions?

Contact us toll-free at 866-803-0389 with questions on your RCF donor-advised fund.



The screenshot displays the user interface for 'The Family Charitable Giving Fund'. At the top, the account value is shown as \$393,572.93. A navigation bar includes links for Account Details, Contributions, Grants, Investments, Resources, Statements, and More. The main content area is divided into several sections:

- RECENT CONTRIBUTIONS:** A table showing a contribution from Graco Inc. on 05/20/2021 for \$5,000.00. A 'View All' button is present.
- RECENT GRANTS:** A table showing three grants to Charity #1, #2, and #3 on 09/04/2019, 08/21/2018, and 08/02/2018 respectively, with amounts of \$300.00, \$2,000.00, and \$5,000.00. A 'View All' button is present.
- DOCUMENTS:** A list of documents, including a 'Copy of Original Online Application (PDF)'.
- GRANT CATEGORY:** A horizontal bar chart showing the distribution of grants: International Affairs (31.8%), Disaster Relief (18.2%), Human Services (11.6%), and Other (38.4%).
- Charitable Impact:** A dark blue box with the text: 'Your giving has real impact! Here's how your grants are supporting the cause you care about most.'
- Interactive Elements:** Buttons for 'Recommend a Grant', 'Add a Grant Goal or a Contribution Goal', 'Email Notifications', and 'Change Settings' are visible.

Donor User Guide

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.

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 is shown 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 29999

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
Stock # 1	\$0.00	\$11,437.00	\$11,437.00	27.06%
Stock # 2	\$0.00	\$12,642.00	\$12,642.00	29.91%
Stock # 3	\$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	Stock # 1	200.000	\$13,781.00
12/28/2017	Stock # 2	350.000	\$22,169.00
12/28/2017	Stock # 3	200.000	\$15,242.00
Total			\$51,192.00

Donor User Guide

Descriptions

Get started

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

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.

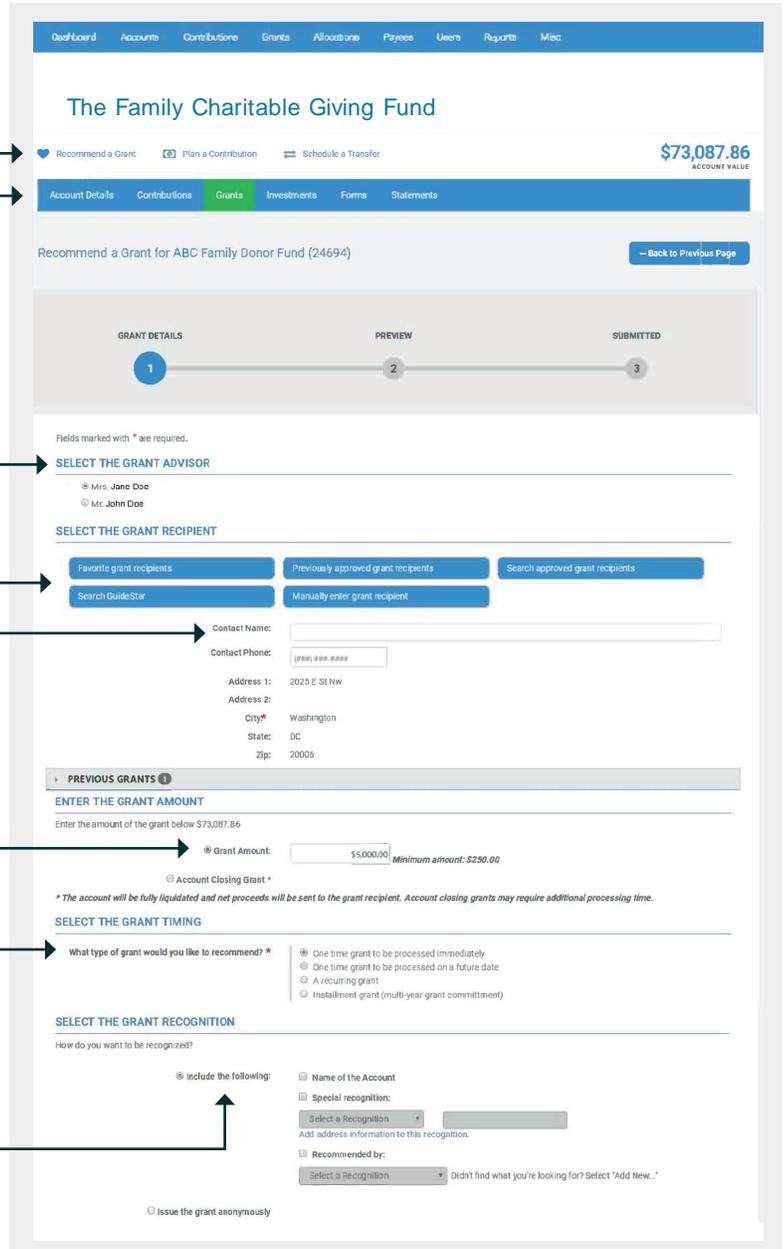
Grant timing

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

RCF 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.



The screenshot shows a web form titled "Recommend a Grant for ABC Family Donor Fund (24694)". The account value is \$73,087.86. The form is divided into three steps: 1. GRANT DETAILS, 2. PREVIEW, and 3. SUBMITTED. The current step is GRANT DETAILS. The form includes sections for "SELECT THE GRANT ADVISOR" (with radio buttons for Mrs. Jane Doe and Mr. John Doe), "SELECT THE GRANT RECIPIENT" (with buttons for Favorite grant recipients, Previously approved grant recipients, Search approved grant recipients, Search GuideStar, and Manually enter grant recipient), "ENTER THE GRANT AMOUNT" (with a text box for Grant Amount, a minimum amount of \$250.00, and an Account Closing Grant checkbox), "SELECT THE GRANT TIMING" (with radio buttons for One time grant to be processed immediately, One time grant to be processed on a future date, A recurring grant, and Installment grant), and "SELECT THE GRANT RECOGNITION" (with a section for "include the following" including Name of the Account, Special recognition, and Recommended by, and an "Issue the grant anonymously" checkbox).

Donor User Guide

Descriptions

Grant purpose

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

Please note that some special purposes require additional review.

Acknowledgment and next

Read and acknowledge the terms for the grant. Clicking “Next” confirms your recommendation is 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

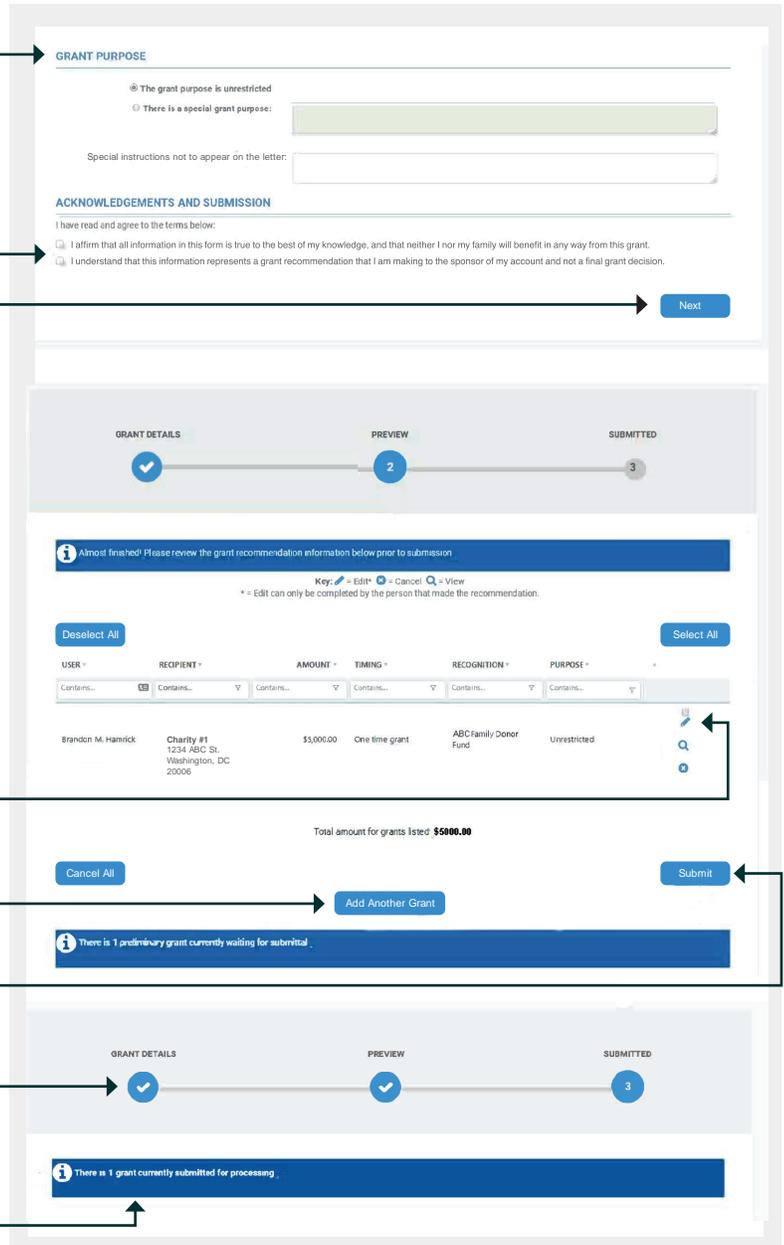
Clicking the “Add Another Grant” button allows you to recommend additional grants in one transaction.

Submit

When ready, submit all grants for processing.

Success and status

Once grants are submitted, a third and final screen confirms they are being 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 and not a final grant decision.

Next

GRANT DETAILS **PREVIEW** **SUBMITTED**

1 2 3

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	Charity #1 1234 ABC St. Washington, DC 20006	\$1,000.00	One time grant	ABC Family Donor Fund	Unrestricted

Total amount for grants listed **\$5000.00**

Cancel All **Add Another Grant** **Submit**

There is 1 preliminary grant currently waiting for submittal.

GRANT DETAILS **PREVIEW** **SUBMITTED**

1 2 3

There is 1 grant currently submitted for processing.

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.

Donor User Guide

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

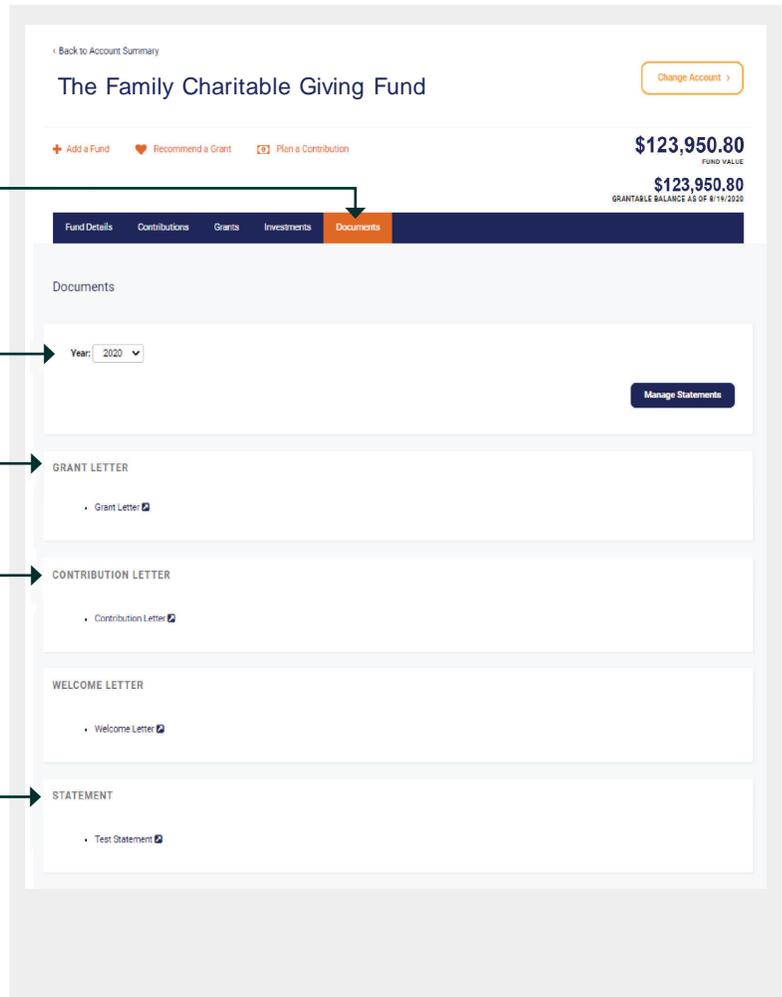
View grant letters sent to charities with processed grants.

Contribution letter

Contribution letters can be used to supplement your tax preparation.

Statements

View quarterly statements for the account.



The screenshot displays the donor portal interface for 'The Family Charitable Giving Fund'. At the top, there is a navigation bar with tabs for 'Fund Details', 'Contributions', 'Grants', 'Investments', and 'Documents'. The 'Documents' tab is currently selected and highlighted in orange. Below the navigation bar, the 'Documents' section is visible, featuring a 'Year' dropdown menu set to '2020' and a 'Manage Statements' button. The main content area lists four document types: 'GRANT LETTER' (with a link to 'Grant Letter'), 'CONTRIBUTION LETTER' (with a link to 'Contribution Letter'), 'WELCOME LETTER' (with a link to 'Welcome Letter'), and 'STATEMENT' (with a link to 'Test Statement'). The top right corner of the page shows the fund's value as '\$123,950.80' and the grantable balance as of 8/19/2020 as '\$123,950.80'. A 'Change Account' button is also present in the top right corner.

Donor User 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 using the parameters set by the organization.

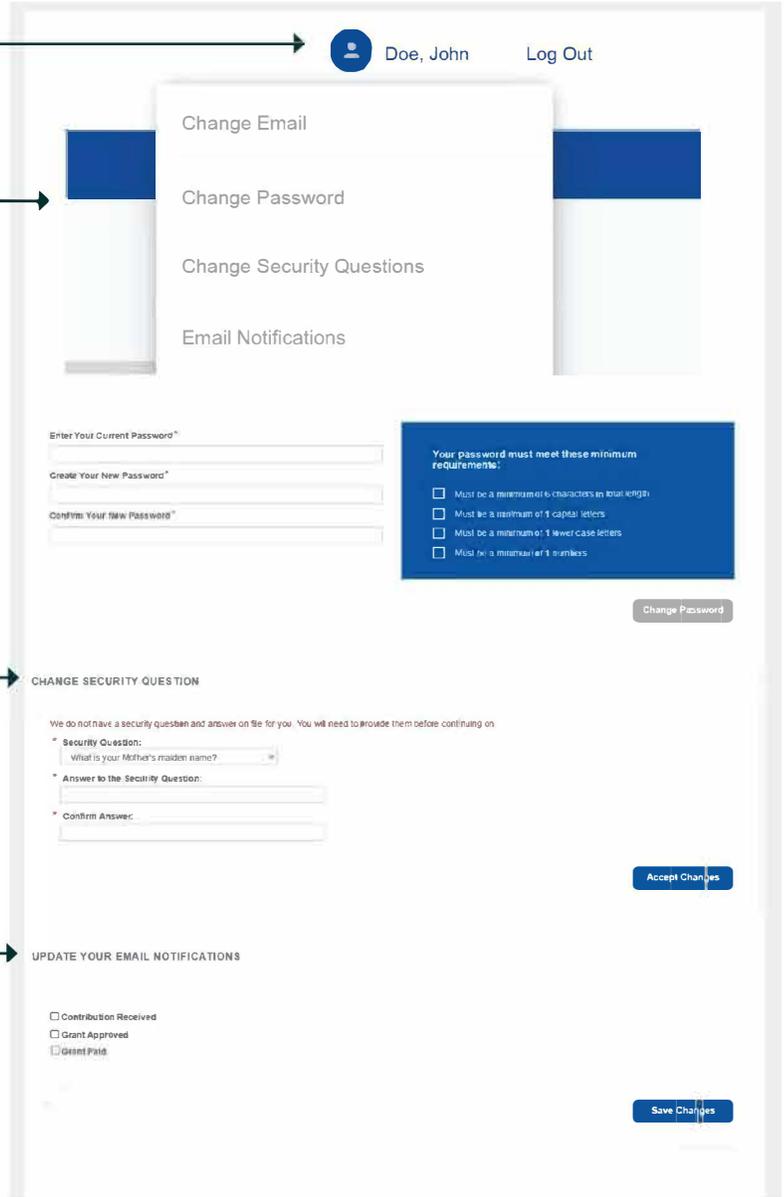
Change security question

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.

*options differ by program



The screenshot shows a user interface for account management. At the top right, there is a user profile for "Doe, John" with a "Log Out" link. A dropdown menu is open, listing options: "Change Email", "Change Password", "Change Security Questions", and "Email Notifications".

The "Change Password" section includes three input fields: "Enter Your Current Password*", "Create Your New Password*", and "Confirm Your New Password*". A blue box on the right lists password requirements:

- Must be a minimum of 6 characters in total length
- Must be a minimum of 1 capital letter
- Must be a minimum of 1 lower case letter
- Must be a minimum of 1 number

 A "Change Password" button is located at the bottom right of this section.

The "CHANGE SECURITY QUESTION" section contains a warning: "We do not have a security question and answer on file for you. You will need to provide them before continuing on". It includes:

- A "Security Question:" dropdown menu with the example "What is your Mother's maiden name?".
- An "Answer to the Security Question:" input field.
- A "Confirm Answer:" input field.

 An "Accept Changes" button is at the bottom right.

The "UPDATE YOUR EMAIL NOTIFICATIONS" section has three checkboxes:

- Contribution Received
- Grant Approved
- Grant Paid

 A "Save Changes" button is at the bottom right.