Renaissance Charitable

RCF DFX User Guide

Donor User Guide

RCF DFX User Guide

Homepage Tour

Descriptions

Quick links

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

Fund details

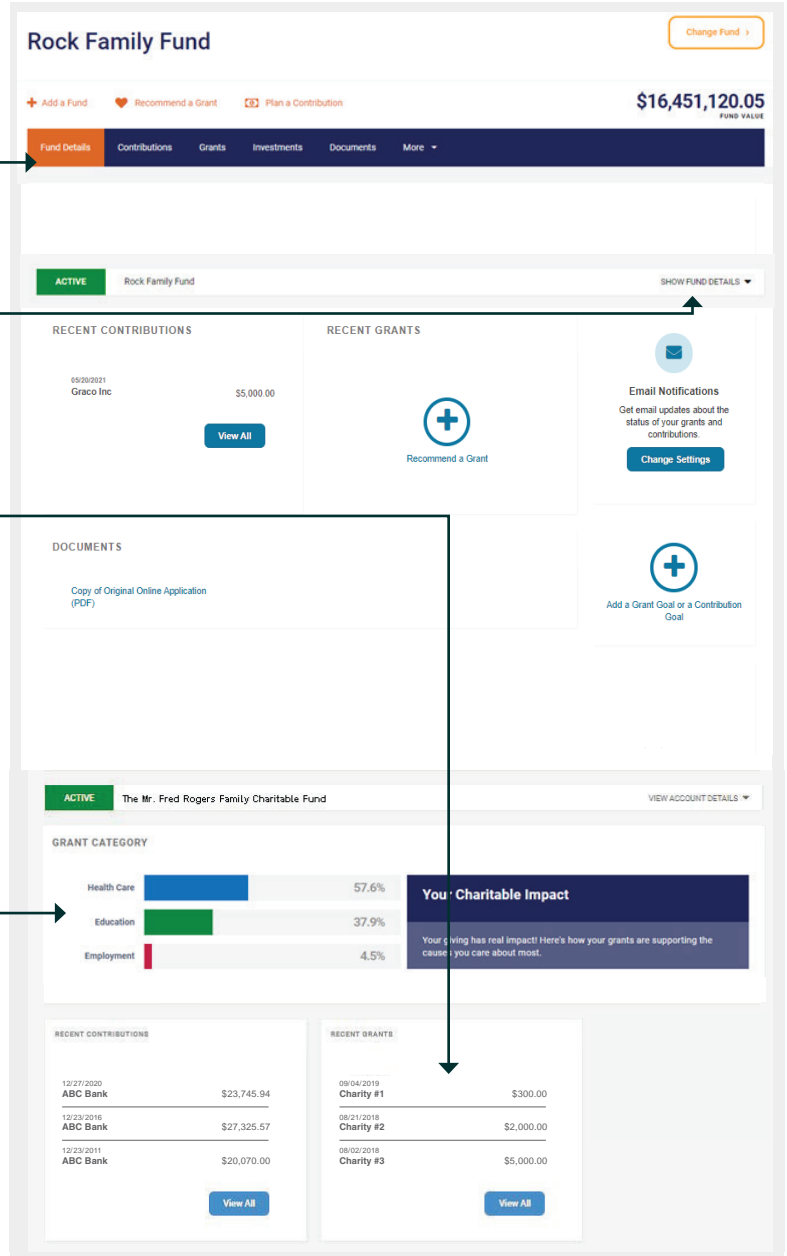Click to expand for full details on a fund.

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 855-630-3439 or at NM@reninc.com with questions on your RCF donor-advised fund.

Renaissance Charitable

Making a Grant

Descriptions

Get started

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

Charity search

Search our database of over a million charities to find one to receive 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

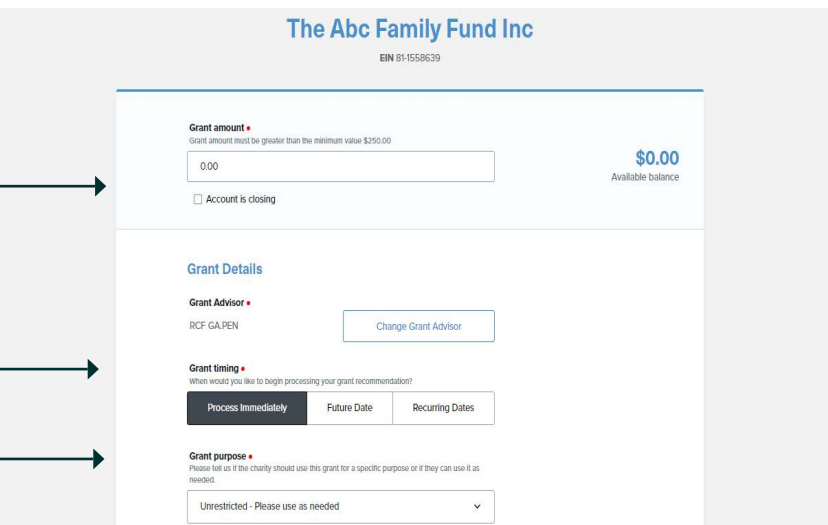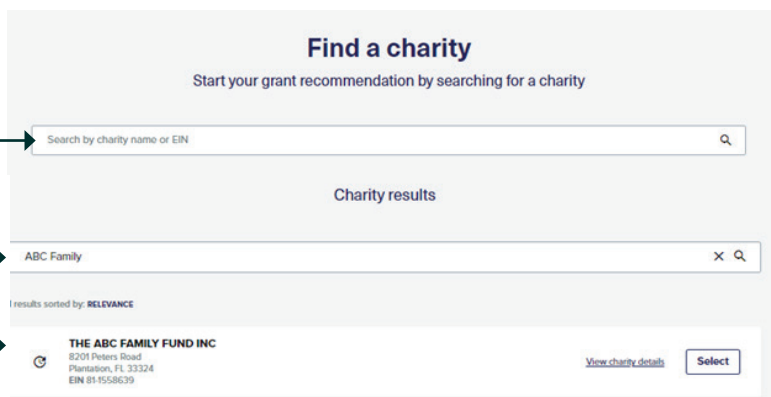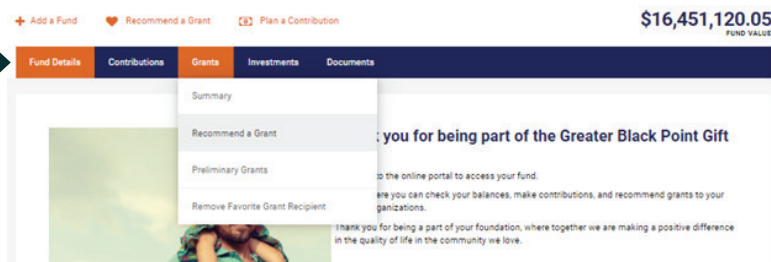Be sure you meet the minimum indicated in the text above the box.

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.

Grant purpose

Would you like the funds to be restricted to a specific purpose? Select a purpose from the dropdown. If you would like to add your own purpose, select "Other" from the dropdown and you will be able to write in your purpose in the "Describe grant purpose" box.

Please note that the charity will see this information on the grant letter.

Making a Grant

Descriptions

Dedication

RCF allows you to choose if the grant will be dedicated to someone to honor them or their legacy.

Acknowledgment

RCF allows you to choose how you are recognized for the grant. Issue it in the name of the fund, the primary donors. Grants can also be issued anonymously. The default is "Fund Name Only". *Please note, the charity will see this information on the grant letter.*
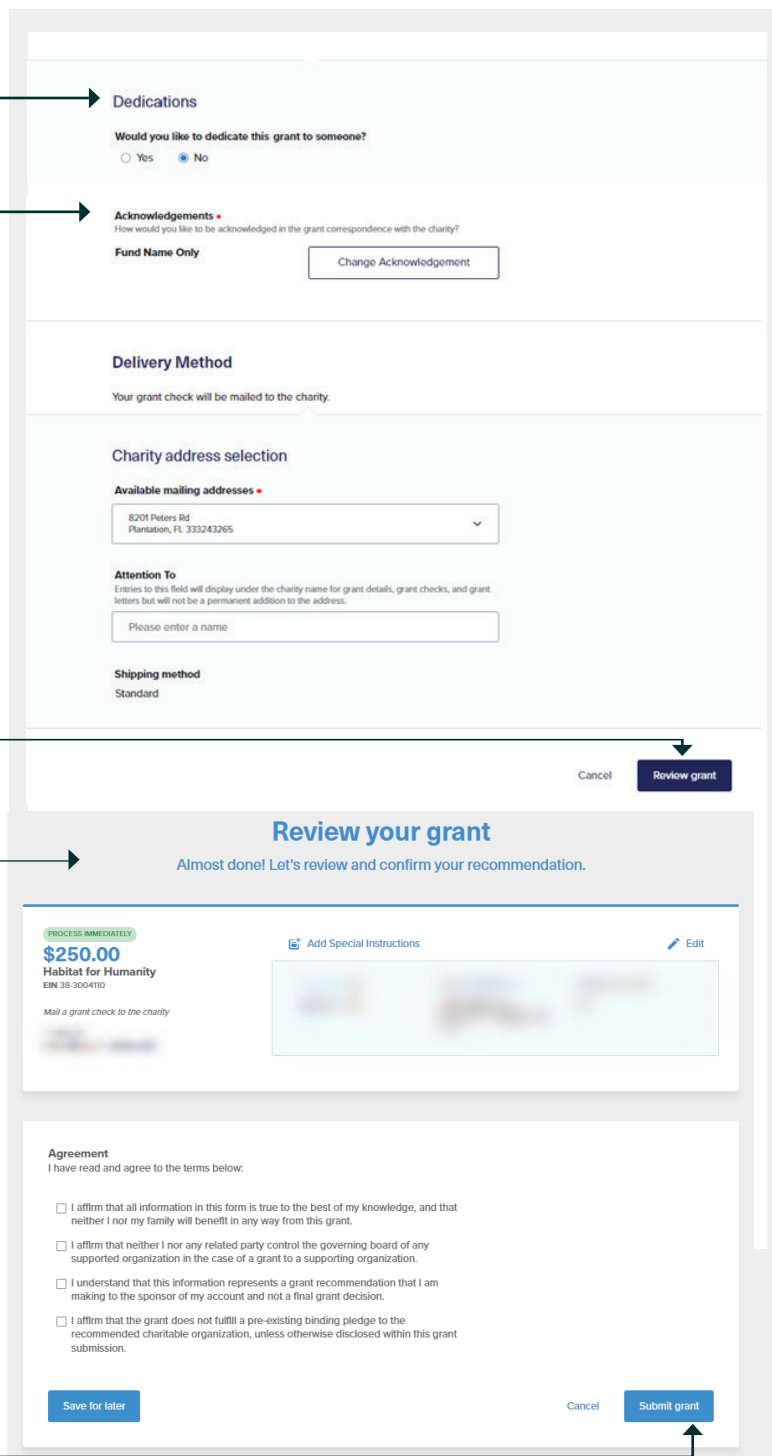
Review grant

Review the grant details before submitting the grant.

Review and submit

Read and acknowledge the terms of the grant. When ready submit the grant for processing. Please note that the "Add Special Instructions" field is only for instructing the RCF team if you would like the grant sent overnight (There is a $25 fee for sending the check via overnight delivery).
These instructions will not be seen by the charity.

The status of your grant submission can be viewed under the 'Grants Listing' tab.

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Finding Documents

Descriptions

Documents tab

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

Year

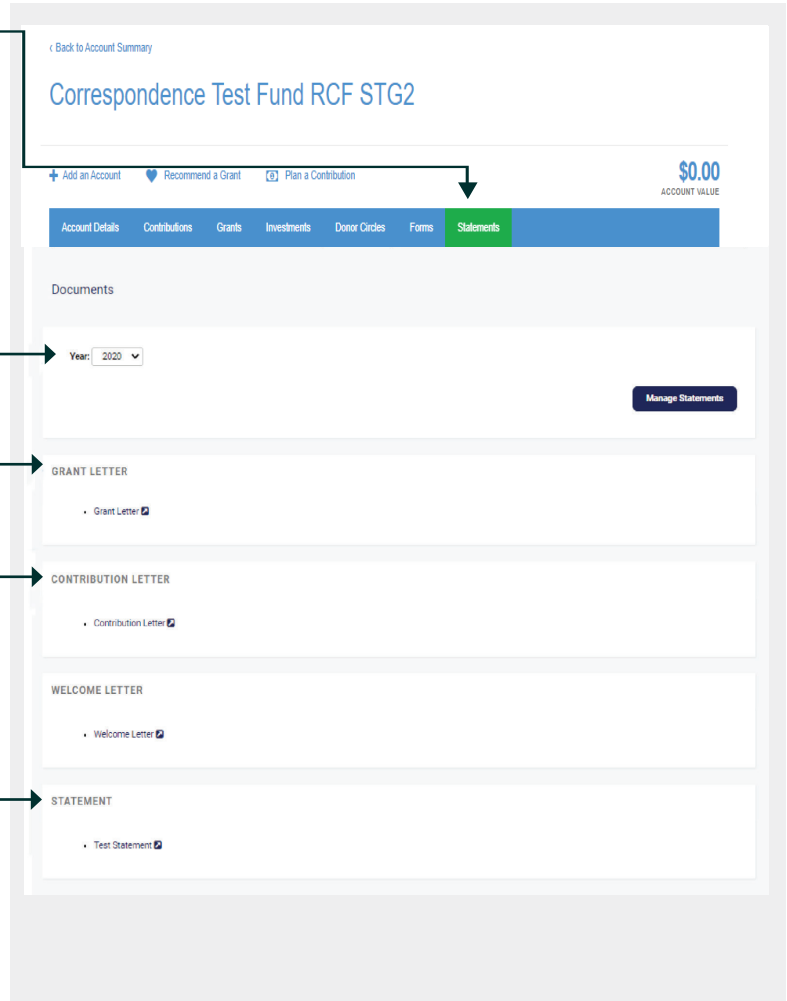Documents are available based on the applicable year.

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.

Understanding Your 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.

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

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Updating Your Profile

Descriptions

User preferences
Hover over your name to change your email, password, email security questions and to customize email notifications.
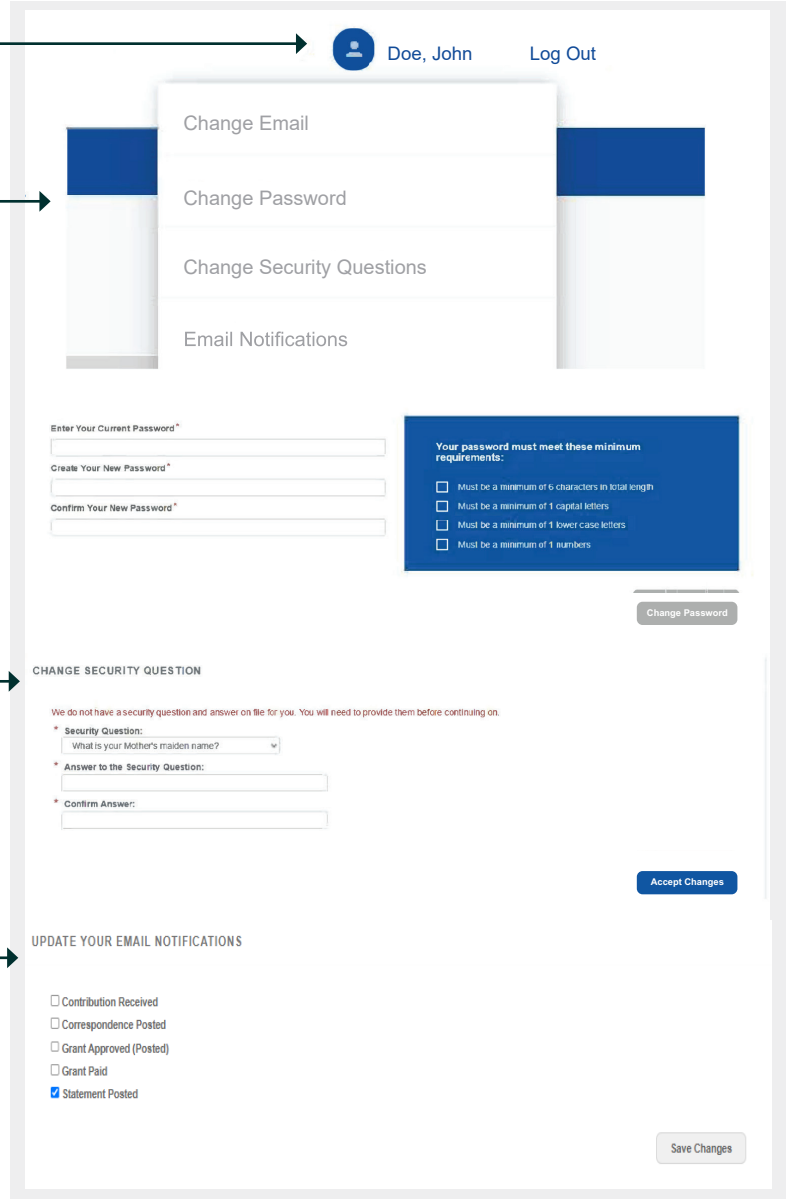
Change password
Change your password using the parameters set by the organization.

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.