

## 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.

#### Charitable impact

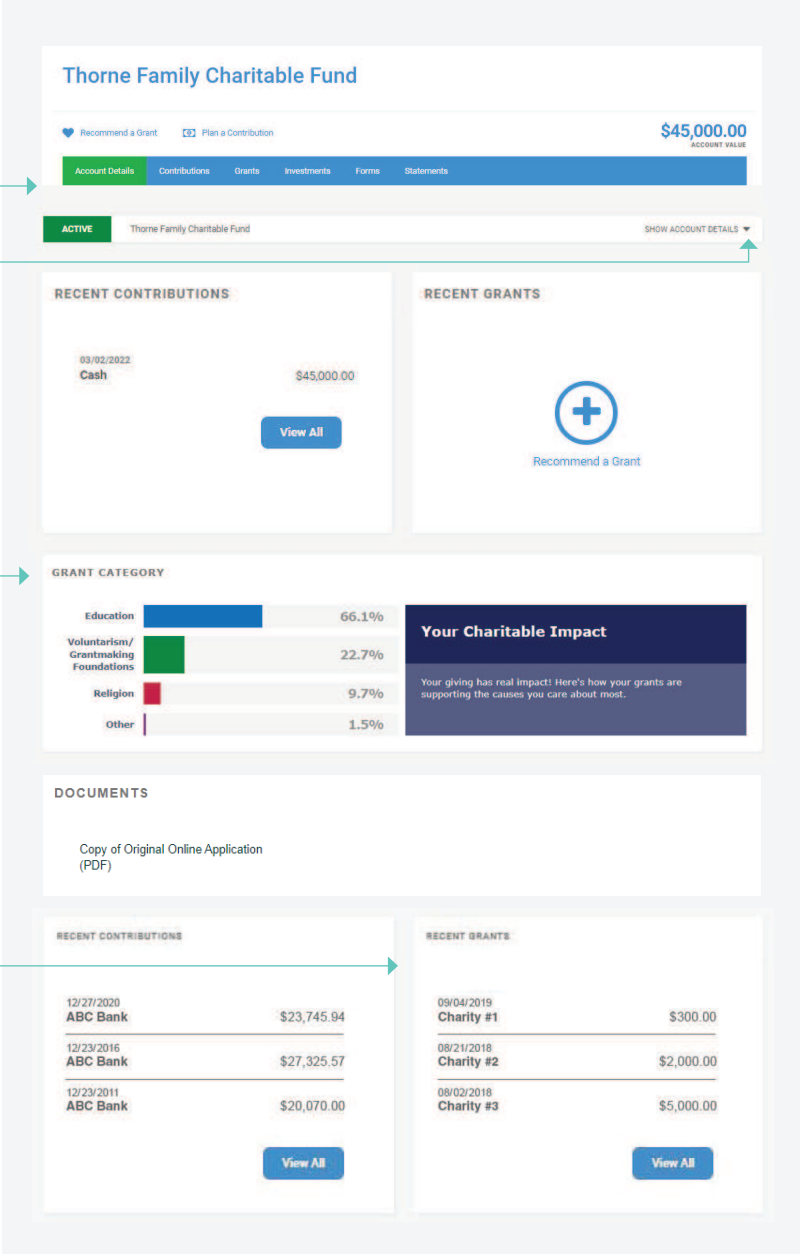
DFX shows you the impact of your giving by breaking grants into philanthropic categories.

#### Recent transactions

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

#### Questions?

Contact us toll-free at 800-811-4428 or [ubs@reninc.com](mailto:ubs@reninc.com) with questions on your RCF donor-advised fund.



**Thorne Family Charitable Fund**

Recommend a Grant | Plan a Contribution | **\$45,000.00** ACCOUNT VALUE

Account Details | Contributions | Grants | Investments | Forms | Statements

**ACTIVE** Thorne Family Charitable Fund | SHOW ACCOUNT DETAILS

**RECENT CONTRIBUTIONS**

Date	Amount
03/02/2022	Cash
	\$45,000.00

[View All](#)

**RECENT GRANTS**

[+ Recommend a Grant](#)

**GRANT CATEGORY**

Category	Percentage
Education	66.1%
Voluntarism/ Grantmaking Foundations	22.7%
Religion	9.7%
Other	1.5%

**Your Charitable Impact**

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

**DOCUMENTS**

Copy of Original Online Application (PDF)

**RECENT CONTRIBUTIONS**

Date	Bank	Amount
12/27/2020	ABC Bank	\$23,745.94
12/23/2016	ABC Bank	\$27,325.57
12/23/2011	ABC Bank	\$20,070.00

[View All](#)

**RECENT GRANTS**

Date	Charity	Amount
09/04/2019	Charity #1	\$300.00
08/21/2018	Charity #2	\$2,000.00
08/02/2018	Charity #3	\$5,000.00

[View All](#)

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## 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 a charity to recommend

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

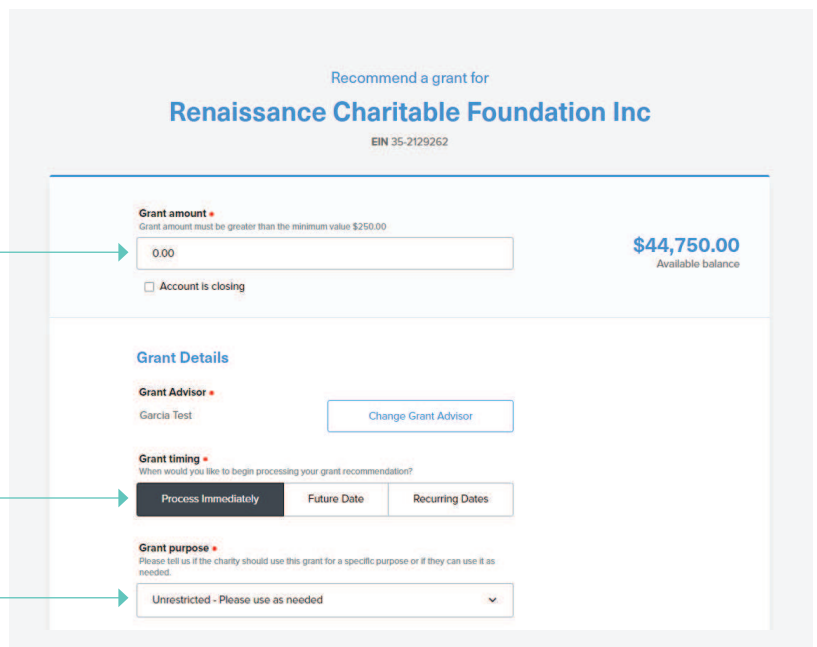
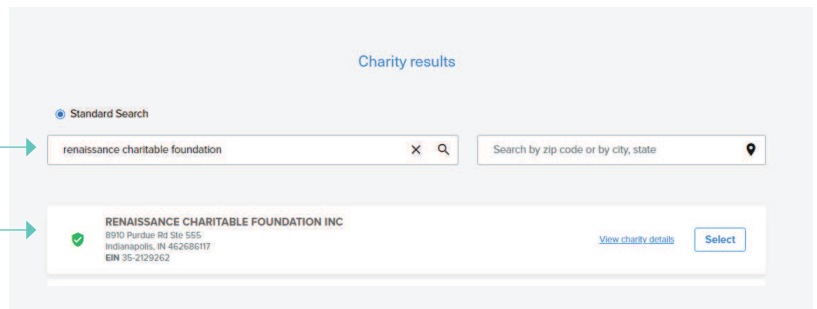
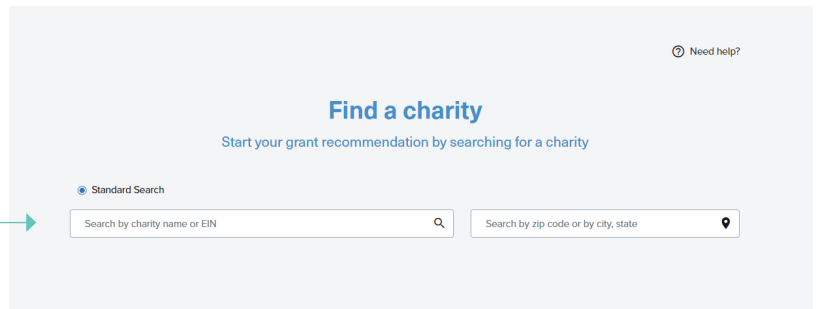
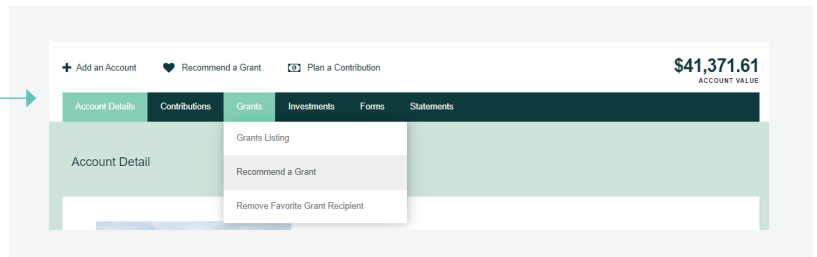
Process your grant recommendation immediately, on a future date or create a recurring grant schedule.

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 for approved grants.



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## 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 for approved grants.

#### Review grant

Review the grant details before submitting the grant recommendation.

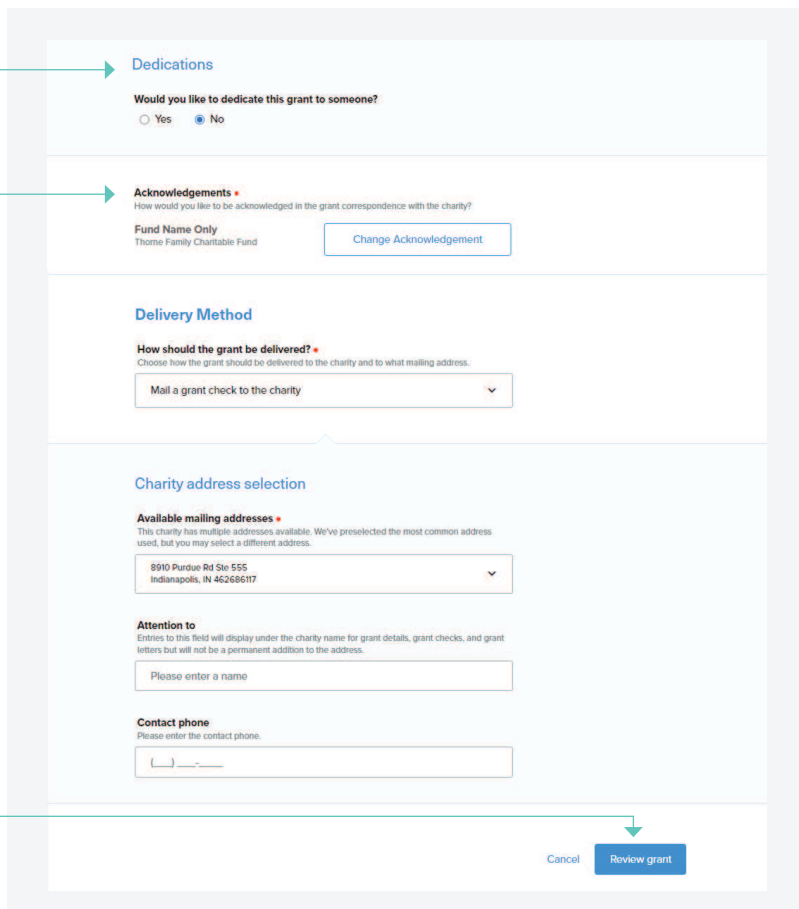
#### Review and submit

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.

#### Status of grant

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



**Dedications**

Would you like to dedicate this grant to someone?

☐ Yes ☒ No

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**Acknowledgements**

How would you like to be acknowledged in the grant correspondence with the charity?

Fund Name Only  
Thorne Family Charitable Fund

[Change Acknowledgement](#)

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**Delivery Method**

How should the grant be delivered?

Choose how the grant should be delivered to the charity and to what mailing address.

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**Charity address selection**

**Available mailing addresses**

This charity has multiple addresses available. We've preselected the most common address used, but you may select a different address.

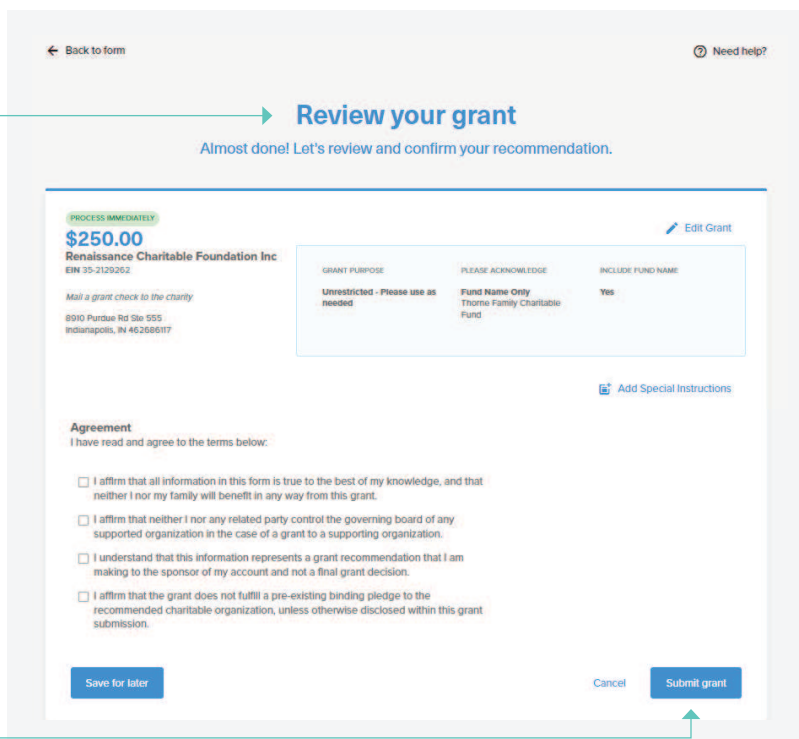
**Attention to**

Entries to this field will display under the charity name for grant details, grant checks, and grant letters but will not be a permanent addition to the address.

**Contact phone**

Please enter the contact phone.

[Cancel](#) [Review grant](#)



[← Back to form](#) [Need help?](#)

### Review your grant

Almost done! Let's review and confirm your recommendation.

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**PROCESS IMMEDIATELY**

**\$250.00**

Renaissance Charitable Foundation Inc.  
EIN 35-2129262

*Mail a grant check to the charity*

8910 Purdue Rd Ste 555  
Indianapolis, IN 462686117

GRANT PURPOSE	PLEASE ACKNOWLEDGE	INCLUDE FUND NAME
Unrestricted - Please use as needed	Fund Name Only Thorne Family Charitable Fund	Yes

[Add Special Instructions](#)

**Agreement**

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 affirm that neither I nor any related party control the governing board of any supported organization in the case of a grant to a supporting organization.

☐ 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.

☐ I affirm that the grant does not fulfill a pre-existing binding pledge to the recommended charitable organization, unless otherwise disclosed within this grant submission.

[Save for later](#) [Cancel](#) [Submit grant](#)

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## Finding documents

### ► Descriptions

#### Statements tab

Clicking the Statements tab will take you to the correspondence page.

#### Year

Documents are available based on the applicable year.

#### Grant letter

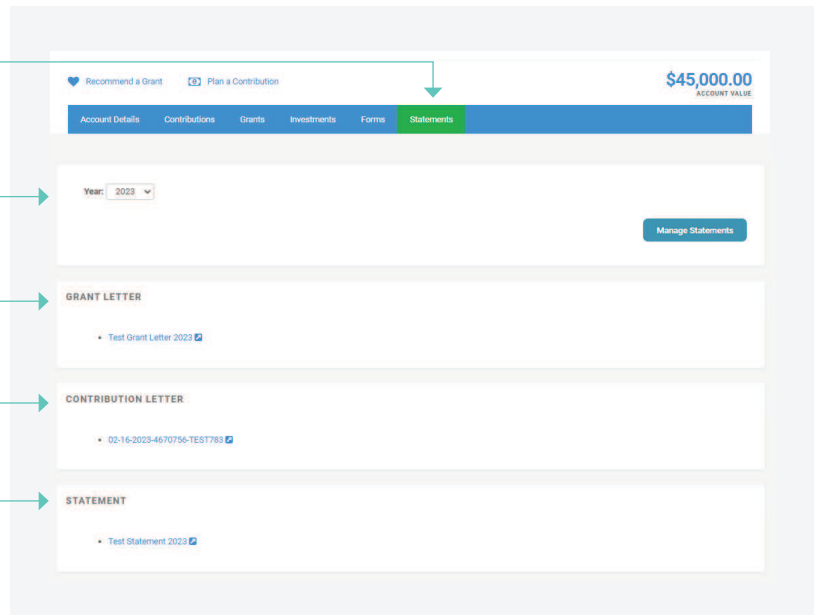
View grant letters sent to charities with processed grants. *Please note, if the grant is sent to the organization electronically, no grant letter will be generated.*

#### Contribution letter

Contribution letters can be used to supplement your tax preparation.

#### Statements

View quarterly statements for the account.



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## 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

January 1, 2023 - March 31, 2023

#### Special Giving Fund Account

Code: TEST178

Account Number: 12345

Renaissance Charitable Foundation Inc\*  
8910 Purdue Rd. Suite 500  
Indianapolis, IN 46268

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

#### Account Summary

<b>Beginning Balance (January 1, 2023)</b>	<b>\$772,804.06</b>
Contributions to Account	\$13,781.00
Grants Paid from Account	(\$10,000.00)
Market Value Changes	\$13,288.85
Interest and Dividends	\$0.00
Realized Gains (Losses)	\$0.00
Account Fees	\$0.00
<b>Ending Balance (March 31, 2023)</b>	<b>\$789,873.91</b>

#### Account Holdings

Description	Beginning Balance	Change in Account Balance	Ending Balance	% of Account
Stock #1	\$295,477.42	\$0.00	\$295,477.42	38.07%
Stock #2	\$477,326.64	\$3,288.85	\$480,615.49	61.93%
<b>Total</b>	<b>\$772,804.06</b>	<b>\$3,288.85</b>	<b>\$776,092.91</b>	<b>100.00%</b>

#### Contributions to Account

Date Received	Description	Quantity	Amount
03/02/2023	Stock #1	200.00	\$13,781.00
<b>Total</b>			<b>\$13,781.00</b>

## Updating your profile

### ► Descriptions

#### User preferences

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

#### Change password

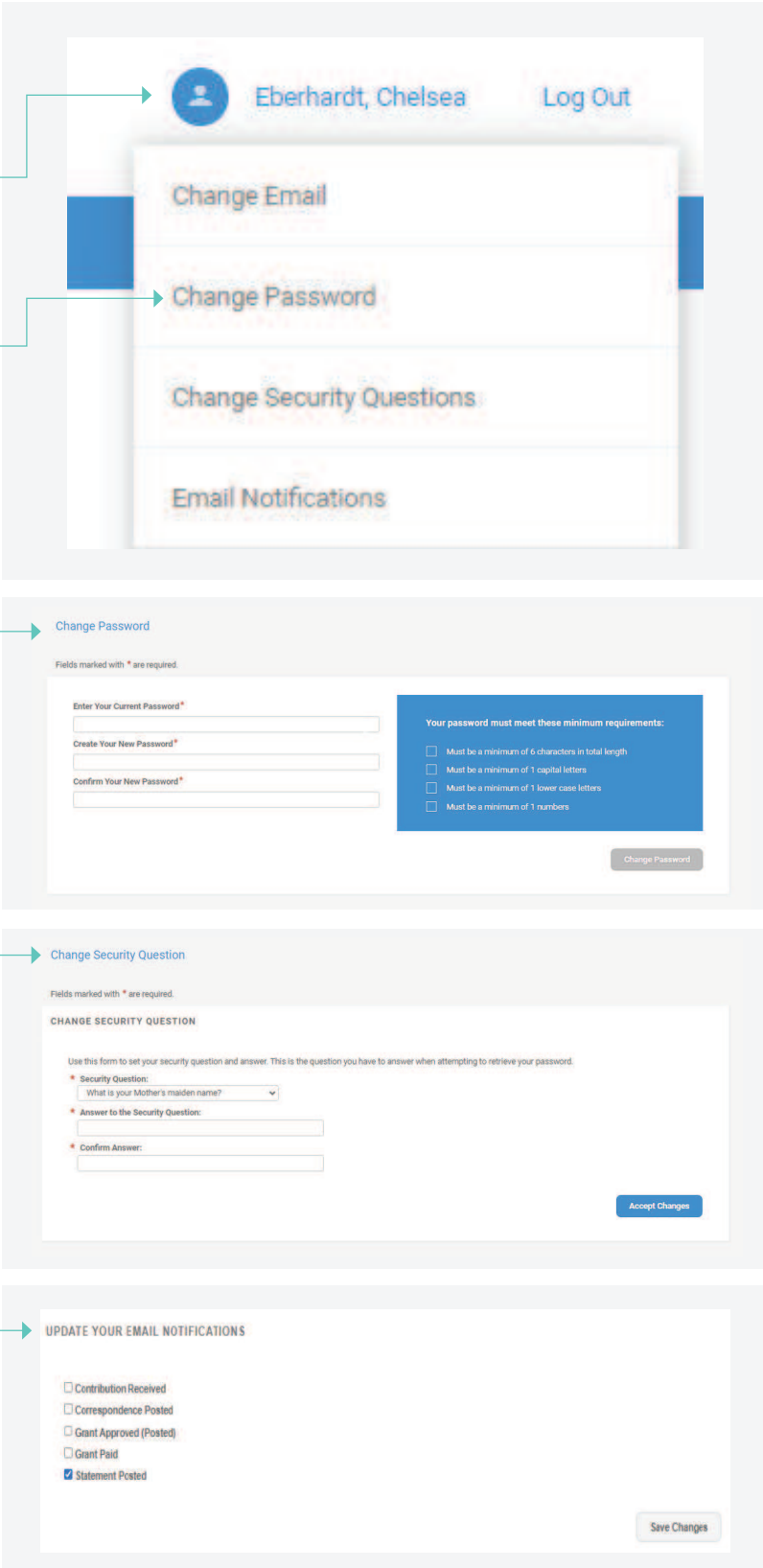
Change your password using the parameters set by the organization.

#### 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.



The interface shows a user profile for "Eberhardt, Chelsea" with a "Log Out" button. A dropdown menu is open, listing "Change Email", "Change Password", "Change Security Questions", and "Email Notifications".

**Change Password**

Fields marked with \* are required.

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**

Fields marked with \* are required.

CHANGE SECURITY QUESTION

Use this form to set your security question and answer. This is the question you have to answer when attempting to retrieve your password.

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

\* Answer to the Security Question:

\* Confirm Answer:

Accept Changes

**UPDATE YOUR EMAIL NOTIFICATIONS**

☐ Contribution Received

☐ Correspondence Posted

☐ Grant Approved (Posted)

☐ Grant Paid

☒ Statement Posted

Save Changes