Welcome to the new Fund Advisor Portal!

Our team has been hard at work to implement a new software system that will improve your user experience as one of our valued fund advisors. As part of our ongoing mission to be the most supportive, responsive and trusted Community Foundation, this new system will now provide more timely access to important information about your fund. We have assembled this quick-reference guide to introduce the basics of the new Fund Advisor Portal. As always, please know our friendly team stands ready to answer any questions you might have.

Note: Certain features of the system pertain only to certain types of accounts. For example, Designated funds making distributions only once per year and scholarship funds will not need to enter grant requests through the portal. And only fund activity on or after January 1, 2020 will be displayed on the portal but you may request historic fund information at any time.

Fund Advisor Reference Guide

Establishing your password

Our Staff will set up your account in the Fund Advisor portal. Once the process has been initiated, you will receive an automated email from sender "no-reply@fcsuite.com" This message will provide instructions on creating a new password for your account. Keep a record of your username, the e-mail address at which you receive the set-up notice, and password, that you will determine, during this process. You will need this information for subsequent logins. *DO NOT* use the link in this email to access the system after you have completed the set up.

Note: If you did not receive an email to access the system but would like a password, please contact hweeden@SouthCoastCF.org

Accessing and Navigating the portal

- Access the portal anytime at this link from any web browser and most devices including smartphones and tablets.
- enter your unique username and password and click 'login'.
- If you serve as an advisor for multiple charitable accounts, you will see the "Choose Fund" menu once you have successfully signed in. Choose the particular account with which you wish to interact. Note, If you are listed as an advisor for only one account, you will not see this screen. Select the fund you want to review, and then use the menu items in the screenshots below to navigate through the Fund Advisor Portal.

Tabs and Features

Home Screen

The main screen provides an at-a-glance list of recent gifts and grants paid out of the fund You will also see the current balance, updated in real-time (or within 48-hours) and the current advisors associated with your fund. Note that each person listed will have similar access to the Fund Advisor Portal.

Keep in mind that Investment returns are posted monthly as are the administrative fees charged. Fees by the brokerage and management companies are charged quarterly and recorded as charged. **That said, while the fund balance listed on the portal may differ from the balance listed on your latest quarterly statement, we still advise that the statement balance is the most accurate figure to reference.**

Contributions

This tab provides the detail for each gift received into the Fund you established. Unless the donor has requested to remain anonymous, you will be able to view more detail about each donor by clicking their name. You can also click the "export" option on the far-right side of the menu bar (as shown below) to export the details in an excel spreadsheet.

Grants

This tab provides detail on all grants paid out from the fund. The top section provides a summary of grants by recipient (grantee). Scroll past the summary section to see grants listed from most recent to oldest.

- 'Complete' in the status column means the grant has been paid.
- Other status indicators may appear throughout the grantmaking process, but please contact staff if you have questions about a grant being paid out.

Grant Requests

use this tab to recommend a grant payment from the fund you established. Note: Agency Endowment, Designate, Field of Interest and Scholarship fund holders will not utilize this tab.

You will find the Grant Requests window divided into four sections:

- The **Grants Listing** appears in the right half of the window. Here you will find each grant recommended/paid from this charitable fund listed in descending date order. Look for the word "Complete" in the Status column to confirm a grant has been successfully paid.
- The first portion on the left side of the screen is labeled '**Other Foundation Funds'**. This field should be used if you are looking to make a grant to another fund of the community Foundation. (i.e. the Foundation's Annual Fund, Women's Fund, AHA!, etc.)
- **Search for Other Grantees** – This box queries the complete list of nonprofit organizations holding current 501 (c)(3) tax-exempt status with the Internal Revenue Service.
- **Enter Grantee Information Manually** – the last section allows you to manually enter the information we will need to process your grant recommendation. The fields marked with a red asterisk are required; providing all the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible.

Statements

Your fund statements will appear under the Statements tab. This ensures each statement is archived in one convenient location that can be accessed at any time by any of the fund advisors. Note: Your portal Statements tab will show your fund's activity. Again, only data on or after January 1, 2020 will be accessible, however, staff will gladly pull historic data for you if you contact us directly.

Files

Important documents related to this charitable fund will be archived here. These files might include, but are not limited to, Executed Fund Agreement, Grant or scholarship acknowledgement letters, Grant reports and updates, etc.

Donate

Use this tab to make a contribution to your fund. Click "Donate To A Fund" at the top right to make a donation to another fund administered by the Community Foundation.

Logout

If you access the Fund Advisor Portal from a shared computer or device, we strongly encourage you to use the Logout option after completing each session. This ensures no one other than you has access to the system.