

My Fund User Guide

Thank you for trusting Indian River Community Foundation as a partner in your philanthropy. We have been working hard to improve online access to your charitable giving account. With a new and improved My Fund, you can process grant recommendations online and view your previous grants and donations. Monthly statements will be available on My Fund soon.

Please follow our step-by-step guides for logging in and making a grant from your fund. We suggest that you have this guide open while you are logging in to the My Fund page. The last section of this packet includes frequently asked questions.

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How to Grant from Your Fund	Page 4
Frequently Asked Questions (FAQs)	Page 10

If you would like further assistance, contact us at 772-492-1407 or donorservices@ircommunityfoundation.org.

First Time Login or Forgot Password

1. Go to www.ircommunityfoundation.org, scroll to the bottom of the page and select My Fund. If this is your first-time logging in or you forgot your password, click “Forgot Password?”

MyFund

Username

Password

[Forgot Password?](#)

Contact us if you need help logging in:

- 772-492-1407
- donorservices@ircommunityfoundation.org

2. Enter the username of your account, which is the email address associated with your account, and click “Reset Password.” If you’re not sure which email is associated with your account, contact us at 772-492-1407.

MyFund

Enter the username of your account and click
Reset Password.

Username

3. Check your email for instructions to reset your account. If you don’t receive them, contact us at 772-492-1407 or donorservices@ircommunityfoundation.org.

MyFund

If an account with the provided username is found,
instructions to reset your password will be sent to
the email address for that account.

4. Click on the reset password link in your email. You will be directed to the page below. Create a password that is at least 8 characters long and includes at least one: lower case letter, upper case letter, number, and special character. Click “save.” We do not have access to your password, we can only help you reset it.

MyFund

Setup Access

Please setup a password to access your account.

Name	Smith, Mr. John J.
Login	info@ircommunityfoundation.org
Password	<input type="password"/>
Confirm Password	<input type="password"/>

Password Requirements

Tips One easy way to create a strong memorable password is to use sentences or small sentence fragments. You are not limited to a single word.

Avoid using single dictionary words or common sentences.

Avoid using birthdays, anniversaries, etc. These things are easy to find online. (e.g. social media)

Good Example:

Bad Example:

Never use the same password on different sites. e.g. don't use your email password for csuite

The easiest thing to do is to use a password manager like LastPass or bitwarden or 1Password just to name a few

5. When the confirmation page appears, click the “continue” button to proceed.

My Fund

Setup Access - Complete

Thanks for setting up your password.

Please make sure and use the login below with your password to access this site in the future.

Login	info@ircommunityfoundation.org
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How to Make a Grant from Your Fund

1. Log in to the home page by going to www.ircommunityfoundation.org, scrolling to the bottom of the page and selecting My Fund.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History **Make A Grant** Statements Financials Logout

MyFund

Current Balance: \$555,731.88
Available to Grant Online: \$347,332.43

Fund Advisors are: Doe, Mrs. Jane Smith, Mr. John J.

Recent Contributions				Recent Grants				
Date	ID	Contributor	Amount	Date	ID	Status	Recipient	Amount
04/07/2016	10438	Doe, Mrs. Jane A.	478,900.00	03/17/2023	14808	Complete	Alzheimer/Parkinson Association of Indian River County, Inc	2,000.00
10/01/2015	9526	Doe, Mrs. Jane A.	313,024.01	03/17/2023	14813	Complete	Hope for Families Center, Inc.	1,000.00
08/19/2015	9460	Doe, Mrs. Jane A.	10,905.02	03/17/2023	14812	Complete	Church of St. Ignatius Loyola	1,000.00

If you are a fund advisor for more than one fund, you will be brought to the “Choose Fund Page” before the home page. Select the fund with which you would like to interact.

MyFund

Choose Fund

Jane Doe Donor Advised Fund

Smith Charitable Fund

2. Click on the “Make a Grant” tab.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History **Make A Grant** Statements Financials Logout

MyFund

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08/19/2015	9460	Doe, Mrs. Jane A.	10,905.02	03/17/2023	14812	Complete	Church of St. Ignatius Loyola	1,000.00

3. In the “Make a Grant” tab you can choose from organizations you have given to in the past, search for an organization, or enter the organization information manually.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History **Make A Grant** Statements Financials Logout

MyFund
Make a Grant

Use this form to request a new grant from your fund. Select a grantee from the drop-down menu or enter a new nonprofit by searching for other grantees. Indian River Community Foundation will receive notification of your request and will process your grant within 5-7 business days. We will contact you once the check has been mailed to the organization. If you would like the check mailed to a different location (e.g. to you), please type the address in the special instructions field on Grant Request form.

The grants listed on the right have been processed and have been paid (or are in the final steps of being paid).

Choose from previous Grantee

Grantees you have given to in the past

or

Search for other Grantees

Name

Grants

Date	Status	Recipient	Description	Amount
03/17/2023	Complete	Rosemont College of the Holy Child Jesus		1,000.00
03/17/2023	Complete	Childcare Resources of Indian River		5,000.00
03/17/2023	Complete	Hope for Families Center, Inc.		1,000.00
03/17/2023	Complete	Church of St. Ignatius Loyola		1,000.00
03/17/2023	Complete	VNA and Hospice Foundation, Inc		10,000.00

To make a grant to an organization you have given to in the past, click on the search bar. Scroll until you see the organization you want to grant to and click on the organization name.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History **Make A Grant** Statements Financials Logout

MyFund
Make a Grant

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Choose from previous Grantee

Grantees you have given to in the past

Search for other Grantees

Alzheimer/Parkinson Association of Indian River County, Inc
American National Red Cross
American National Red Cross
Ann & Robert H Lurie Childrens Hospital of Chicago
Autism Speaks
Boys and Girls Clubs of Indian River County
Calvary Fund Inc
Childcare Resources of Indian River
Children of Fallen Patriots Foundation
Church of St. Ignatius Loyola

Grants

Date	Status	Recipient	Description	Amount
03/17/2023	Complete	Rosemont College of the Holy Child Jesus		1,000.00
03/17/2023	Complete	Childcare Resources of Indian River		5,000.00
03/17/2023	Complete	Hope for Families Center, Inc.		1,000.00
03/17/2023	Complete	Church of St. Ignatius Loyola		1,000.00
03/17/2023	Complete	VNA and Hospice Foundation, Inc		10,000.00
03/17/2023	Complete	Autism Speaks		1,000.00
03/17/2023	Complete	Mental Health Association in		2,000.00

To search for an organization you have not given to before, type in the name of the organization and click search. For better accuracy, type in the city and state for the organization.

MyFund

Make a Grant

Use this form to request a new grant from your fund. Select a grantee from the drop-down menu or enter a new nonprofit by searching for other grantees. Indian River Community Foundation will receive notification of your request and will process your grant within 5-7 business days. We will contact you once the check has been mailed to the organization. If you would like the check mailed to a different location (e.g. to you), please type the address in the special instructions field on Grant Request form.

The grants listed on the right have been processed and have been paid (or are in the final steps of being paid).

Choose from previous Grantee

Grantees you have given to in the past

or

Search for other Grantees

Name

City

State

or

Grants

Date	Status	Recipient	Description	Amount
03/17/2023	Complete	Rosemont College of the Holy Child Jesus		1,000.00
03/17/2023	Complete	Childcare Resources of Indian River		5,000.00
03/17/2023	Complete	Hope for Families Center, Inc.		1,000.00
03/17/2023	Complete	Church of St. Ignatius Loyola		1,000.00
03/17/2023	Complete	VNA and Hospice Foundation, Inc		10,000.00
03/17/2023	Complete	Autism Speaks		1,000.00
03/17/2023	Complete	Mental Health Association in Indian River County, Inc.		2,000.00
03/17/2023	Complete	Alzheimer's/Dementia		2,000.00

All organizations with the same information you entered will be listed. The “Indian River Community Foundation Results” are organizations already in our system, meaning you or another donor has given to the organization in the past. The “Guidestar Results” are all organizations that file with the IRS. If you choose from the Guidestar Results list, IRCF will do due diligence to confirm. When you see the correct organization listed, click “Create Request.”

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History Make A Grant Statements Financials Logout

MyFund

Grantee Search Results for "Hope for Families"

Indian River Community Foundation Results **Guidestar Results**

Name	City / State	EIN
Create Request Hope for Families Center, Inc.	Vero Beach, FL	59-3129752

1 - 1 of 1

Search again

Name

Complete the description of the grant (if any), the amount, check the box if you want to grant anonymously, a desired frequency of the grant (if any), attach a file and description (if any), add special instructions (if any), and click "Add to Grant Requests." Please note the grant description will appear on the check, but the special instructions will not appear on the check. Attachments are any files you may have related to the grant.

Jane Doe Donor Advised Fund

[Home](#) [Choose Fund](#) [Contributions](#) [Grant History](#) [Make A Grant](#) [Statements](#) [Financials](#) [Logout](#)

MyFund

Grant Request

Grantee	Hope for Families Center, Inc.
Description	<input type="text" value="Unrestricted/ General Operating Support."/> 40/255 characters
Amount	<input type="text" value="5000"/>
Anonymous	<input type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)
Attachment Description	<input type="text"/>
Special Instructions (will not print on check). Please let us know if this grant requires any special processing.	<input type="text" value="Mail to my Vero Beach home at: 201 Coconut Palm Road, Indian River Shores, FL 32963."/>

You will be directed back to the “Make a Grant” page. Repeat the steps above to make another grant request. Your grant shopping cart will then be displayed in the top right corner. Use the buttons in the shopping cart to edit, delete, or review these grants.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History **Make A Grant** Statements Financials Logout

MyFund
Make a Grant

Use this form to request a new grant from your fund. Select a grantee from the drop-down menu or enter a new nonprofit by searching for other grantees. Indian River Community Foundation will receive notification of your request and will process your grant within 5-7 business days. We will contact you once the check has been mailed to the organization. If you would like the check mailed to a different location (e.g. to you), please type the address in the special instructions field on Grant Request form.

The grants listed on the right have been processed and have been paid (or are in the final steps of being paid).

Choose from previous Grantee

Grantees you have given to in the past

or

Grant Requests

	Recipient	Description	Amount	
Delete	Hope for Families Center, Inc.	Unrestricted/ General Operating Support.	5,000.00	Edit
Grant Request Total			5,000.00	Review

Grants

Date	Status	Recipient	Description	Amount
03/17/2023	Complete	Rosemont College of the Holy Child Jesus		1,000.00

After reviewing the grants in your shopping cart, click “Submit Requests” to complete the grantmaking process. Please note, by clicking "Submit Requests" you agree that every penny of this grant(s) will be used for a charitable purpose, and neither you nor anyone you know will receive anything more than a coffee mug or any incidental benefit in return.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History **Make A Grant** Statements Financials Logout

MyFund
Review Grant Requests

Grantee	Description	Amount	Anonymous
Hope for Families Center, Inc.	Unrestricted/ General Operating Support. Special Instructions (will not print on check). Please let us know if this grant requires any special processing.: Mail to my Vero Beach home at: 201 Coconut Palm Road, Indian River Shores, FL 32963.	\$ 5,000.00	No
Alzheimer/Parkinson Association of Indian River County, Inc	Unrestricted/ General Operating Support. Special Instructions (will not print on check). Please let us know if this grant requires any special processing.: I will pick this check up from your office.	\$ 5,000.00	No
Total		\$ 10,000.00	

By clicking "Submit Requests" you agree that every penny of this grant(s) will be used for a charitable purpose, and neither you nor anyone you know will receive anything more than a coffee mug or any incidental benefit in return.

[Submit Requests](#)

Congratulations! You have submitted your grant request. IRCF staff will receive notification of your request and will process your grant within 5-7 business days.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History Make A Grant Statements Financials Logout

MyFund

Grant Request Submitted

Continue

You can check on the status of any grant by going to the “Make a Grant” page and looking under the status column. If the status is still in “Request” you can cancel the grant by clicking the “Cancel” button.

Jane Doe Donor Advised Fund

Home Choose Fund Contributions Grant History **Make A Grant** Statements Financials Logout

MyFund

Make a Grant

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Choose from previous Grantee

Grantees you have given to in the past

or

Search for other Grantees

Name

City

State Search

Grants

Date	Status	Recipient	Description	Amount	
07/20/2023	Request	Alzheimer/Parkinson Association of Indian River County, Inc	Unrestricted/ General Operating Support.	5,000.00	Cancel
07/20/2023	Request	Hope for Families Center, Inc.	Unrestricted/ General Operating Support.	5,000.00	Cancel
03/17/2023	Complete	Childcare Resources of Indian River		5,000.00	
03/17/2023	Complete	Hope for Families Center, Inc.		1,000.00	
03/17/2023	Complete	Church of St. Ignatius Loyola		1,000.00	
03/17/2023	Complete	VNA and Hospice Foundation, Inc		10,000.00	
03/17/2023	Complete	Autism Speaks		1,000.00	

Frequently Asked Questions

How quickly is activity posted to my fund and reflected in “Current Balance”?

- Contributions to your fund are normally posted within three to five business days of receipt, and they are reflected as of the date the deposit is received. Gifts of assets other than cash (stock, real estate, etc.) may take longer to show in the fund balance. Contributions that do not include the six-digit fund ID may be delayed.
- Grants from your fund are normally processed within five to seven business days, if there is no extra due diligence required. The date reflects the day the grant check is generated.
- Administrative fees and net investment returns (realized and unrealized capital gains and losses, interest, dividends, and investment management fees) are allocated monthly and are generally posted around the 15th of the following month.

What is the difference between “Current Balance” and “Available to Grant Online”?

“Current Balance” shows the total value of the assets in your fund. “Available to Grant Online” reduces that amount by any outstanding grants or other liabilities. It is also affected by the investment strategy in place for your fund – the most conservative investment strategies have the highest online granting ability. If you would like to make a grant or grants that total more than the “Available” balance, please contact our donor services team by calling 772-492-1407 or sending an email to donorservices@ircommunityfoundation.org.

How can I review previous grants?

The Grant History tab reflects all grants since the fund was established. Click the Grant ID to review grant details. Note that older grants or grants submitted via phone, email or fax may not include full detail.

Can I use my donor-advised fund to pay for a membership?

You may use your fund to cover the cost of a membership if the charity confirms that the full cost is 100 percent tax deductible. You may also use your fund to cover the cost of a membership if your grant recommendation states that you waive all benefits related to the membership.

Here are examples of incidental membership benefits that you can receive in exchange for your grant from your donor-advised fund:

- Free admission to all exhibits
- Discounted or free parking
- Discounts at the gift shop
- Preferred access to special ticketed events where you pay for tickets separately
- Invitations to members-only exhibits
- Low-cost items, such as a newsletter, calendar, key chain, or coffee mug

Can I use my donor-advised fund for events?

You may use your fund to make grants to charities in support of their events, but here are a few things to keep in mind:

Tickets, Tables, and Sponsorships

The full cost to attend in-person or virtual events (both the tax-deductible and non-tax-deductible portions) must be paid from your personal bank account. You may pay any remaining sponsorship costs from your fund, as long as you do not receive more than an incidental benefit in return. Logo or name recognition in event materials is not considered more than an incidental benefit. When submitting a grant request for a sponsorship, please note in your grant recommendation that you will cover the full cost of the tickets or table separately.

Here is one example of what you can pay from your donor-advised fund for an event:

- A \$5,000 event sponsorship includes a table for 10 and your name or logo in event materials.
- If the lowest ticket price to attend the event is \$100, you will pay \$1,000 for the table personally from your bank account ($\$100 \times 10$ seats at the table) and you can use your donor-advised fund to cover the remaining \$4,000.
- Keep in mind that the amount that can be paid from your donor-advised fund is not always the tax-deductible amount published by the charity. The Community Foundation can help you calculate what portion of the event sponsorship can come from the fund based on the benefits received.
- If you choose not to accept any benefits associated with a sponsorship, the entire amount may be paid through the fund.

Raffles and Auctions

You may use your fund to support “fund-a-need” calls for donations at charitable events, but you may not use your fund to purchase raffle tickets or auction items.

Can I use my donor-advised fund for scholarships?

You may use your fund to support a scholarship program administered by a 501(c)(3) public charity, such as the Scholarship Foundation of IRC, or educational institution, but you may not earmark dollars to assist a specific individual.

Can I use my donor-advised fund to support someone’s mission trip or 5k race?

You may make a contribution to a 501(c)(3) public charity or religious institution in honor of an individual as long as the charity exercises complete discretion and control over the donation.

Many donations of this nature do not provide a direct benefit to an individual but are in recognition of an individual’s fundraising efforts. Therefore, when submitting grants in honor of individuals, please explicitly state that the donations are “in honor of [individual’s name].” For example: “In honor of John Smith’s Mission Trip” or “In honor of Jane Smith’s 5k Race Team.”

Can I use my donor-advised fund to give to an athletic fund?

You may use your fund to support a college or university athletic program if your grant request states that you waive all benefits, including priority seating at athletic events, ticket rights or points.

Can I use my donor-advised fund to fulfill a pledge?

By law, you may not use your fund to fulfill pledges and commitments to support 501(c)(3) public charities if they are irrevocable and legally binding. However, the Foundation understands that many pledge and commitment forms are not legally binding but are simply statements of intent to make a donation. When submitting grants for non-legally binding pledges and commitments, it is best to describe them as “annual gifts.” If you must reference a non-binding pledge or commitment in your grant recommendation, please state that it is for a “non-legally binding pledge/commitment,” “donation,” or “gift.”

When you are asked to provide a written commitment to support a charity, and you wish to use your fund, the Foundation suggests using the following language, so the charity understands that your grant is in response to a request for a non-legally binding pledge or commitment: *“I commit to recommend that the Indian River Community Foundation make a grant for \$_____ from my donor-advised fund.”*

If you have any additional questions, please contact us at 772-492-1407 or donorservices@ircommunityfoundation.org.