

My Fund User Guide

Thank you for trusting Indian River Community Foundation as a partner in your philanthropy. We have improved online access to your charitable giving account. With a new and improved My Fund, you can process grant recommendations online, view your previous grants and donations, and access monthly statements.

Please follow our step-by-step guide 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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If you would like further assistance, contact us at 772-492-1407 or donorservices@ircommunityfoundation.org.

First Time Logging in or Forgot Your Password

To access My Fund, please follow these steps:

1. Visit www.ircommunityfoundation.org.
2. Click MY FUND at the footer of the home page.
3. Click "Forgot Password?"
4. Enter your username (email) and click "Reset Password."
5. Follow the reset link in your email to reset your password

Username: _____

New Password: _____ Date Updated: _____

Username: _____

New Password: _____ Date Updated: _____

<p>Username <input type="text"/></p> <p>Password <input type="password"/></p> <p>Forgot Password?</p> <p><input type="button" value="Login"/></p>	<p>Enter the username of your account and click Reset Password.</p> <p>Username <input type="text"/></p> <p><input type="button" value="Reset Password"/></p>
<p>If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account.</p> <p><input type="button" value="Return to Login"/></p>	

If you ever require assistance, our Donor Services team will be more than happy to help, including lost or forgotten usernames and passwords. They can be contacted at 772-492-1407 or donorservices@ircommunityfoundation.org.

How to 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.

Donor Advised Fund Test CREATE GRANT REQUEST

Current Balance **22,500.00** Available to Grant Online Immediately **22,500.00**

Recent Contributions

10 entries per page Search:

ID	Date	Contributor	Amount
23506	02/27/2025	Swift, Mrs. Andrea	25,000.00

Showing 1 to 1 of 1 entry

Recent Grants

10 entries per page Search:

ID	Date	Status	Grantee	Amount
26907	02/27/2025	approval	Homeless Children's Foundation of Indian River County Inc.	500.00
26906	02/27/2025	approval	Ocean Research and Conservation Association, Inc.(ORCA)	500.00

2. Click on "Make a Grant" tab.

Donor Advised Fund Test CREATE GRANT REQUEST

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10 entries per page Search:

ID	Date	Contributor	Amount
23506	02/27/2025	Swift, Mrs. Andrea	25,000.00

Showing 1 to 1 of 1 entry

Recent Grants

10 entries per page Search:

ID	Date	Status	Grantee	Amount
26907	02/27/2025	approval	Homeless Children's Foundation of Indian River County Inc.	500.00
26906	02/27/2025	approval	Ocean Research and Conservation Association, Inc.(ORCA)	500.00
26905	02/27/2025	approval	Indian River Community Foundation	1,000.00
26908	02/27/2025	approval	Childcare Resources of Indian River	500.00

3. Click on "Create Grant Request."

The screenshot shows a web form for creating a grant request. On the left is a navigation menu with items: FUND SUMMARY, CONTRIBUTIONS, GRANT HISTORY, MAKE A GRANT, and RESOURCES & DOCUMENTS. The main content area has a dropdown menu set to 'Donor Advised Fund Test'. Below this are instructions: 'Select "Create Grant Request." You can select from your fund's previous grantees, search our database for a grantee, or enter a grantee manually. Indian River Community Foundation will be notified 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.' There are sections for 'Special Instructions' and 'Description'. Below these is a 'Grants' table with columns: Request Date, Status, Recipient, Description, and Amount. The table lists four pending grants. A green circle highlights the 'CREATE GRANT REQUEST' button in the top right corner.

Request Date	Status	Recipient	Description	Amount
02/27/2025	Pending	Homeless Children's Foundation of Indian River County Inc.	Summer Programs from Andrea and Scott Swift	500.00
02/27/2025	Pending	Ocean Research and Conservation Association, Inc. (ORCA)	Save our Lagoon	500.00
02/27/2025	Pending	Indian River Community Foundation	Operating Support	1,000.00
02/27/2025	Pending	Childcare Resources of Indian River	Starfest sponsor. No personal benefits received.	500.00

4. You can choose to make a grant from (1) organizations you have given to in the past, (2) search for an organization, or (3) enter the organization information manually.

NOTE: Special Instructions: Notes for staff regarding internal processing such as "mail check to my home."
Description: Information provided here such as "For Operations from John and Jane Doe" will appear on the check.

This screenshot shows the same form as above, but with a section for choosing a grantee type. Below the 'Description' field, there is a link 'Grant request > Choose Type' and three buttons: 'PREVIOUS GRANTEE', 'SEARCH GRANTEE', and 'MANUAL GRANTEE'. These three buttons are circled in green and numbered 1, 2, and 3 respectively below them.

1. Organizations you have given to in the past. Select "Previous Grantee."
 Select the organization you wish to give to again, update the description (will print on check), amount, anonymity, special instructions (will not print on check). Click "Add to Cart."

Grant Request > Choose Type

PREVIOUS GRANTEE SEARCH GRANTEE MANUAL GRANTEE

Grant Request > Choose Type > Search

Choose from previous Grantees or Funds

Grantees you have given to in the past

Childcare Resources of Indian River
Homeless Children's Foundation of Indian River County Inc.
 Indian River Community Foundation
 Ocean Research and Conservation Association, Inc.(ORCA)

Grant Request

Grantee Homeless Children's Foundation of Indian River County Inc.

Description For summer programs from Andrea and Scott Swift.
 48/255 characters

Amount 500

Anonymous

Recurring

Attachment No file chosen
 (or drag and drop anywhere on the page)

Attachment Description

Special Instructions (will not print on check). Please let us know if this grant requires any special processing.
 Hold check at IRCF for pickup.

ADD TO CART

2. Search for an organization you have not given to before. Select "Search Grantee." Type in a part or all of the name of the organization you are looking for. For better accuracy, include the city and the state.

[Grant Request](#) > Choose Type

PREVIOUS GRANTEE **SEARCH GRANTEE** MANUAL GRANTEE

Search for Grantees

Grantee Name

City State

EIN

SEARCH

All organizations matching 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 "Candid Results" are all organizations that file with the IRS. If you choose from the Candid Results list, IRCF will do further due diligence. When you see the correct organization listed, click "Create Request."

Search Results for "treasure"

INDIAN RIVER COMMUNITY FOUNDATION RESULTS **CANDID RESULTS**

	Name	Address	EIN
CREATE REQUEST	Baseball Club of the Treasure Coast	466 33rd Ave SW Vero Beach, FL 32968	27-5015511
CREATE REQUEST	Girls on the Run of the Treasure Coast, Inc.	PO Box 114 Vero Beach, FL 32961	45-2563350
CREATE REQUEST	Safe Families for Children of the Treasure Coast	1400 27th Street Vero Beach, FL 32960	453194102
CREATE REQUEST	Special Equestrians of the Treasure Coast Inc	P.O. Box 651312 Vero Beach, FL 32965	59-3148178
CREATE REQUEST	Treasure Coast Board Rider, Inc	1275 12th Ave SW Vero Beach, FL 32962	85-1335998
CREATE REQUEST	Treasure Coast Community Health, Inc.	1555 Indian River Blvd. Suite B-210 Vero Beach, FL 32960	59-3219191
CREATE REQUEST	Treasure Coast Educational Media Inc	9055 Americana Road, Suite 24 Vero Beach, FL 32966	46-3114459
CREATE REQUEST	Treasure Coast Homeless Services Council, Inc.	2525 Saint Lucie Avenue Vero Beach, FL 32960	52-2254571
CREATE REQUEST	Visiting Nurse Association Of The Treasure Coast	1110 35th Lane Vero Beach, FL 32960	59-2664912

1 - 9 of 9

Enter data: Description (will print on check), amount, select anonymous if you would like your fund name NOT to appear on the check, and include any special instructions for our staff (these will not appear on check). Click "Add to Cart."

Grant Request

Grantee Treasure Coast Community Health, Inc.

Description
40/255 characters

Amount

Anonymous

Recurring

Attachment No file chosen
(or drag and drop anywhere on the page)

Attachment
Description

Special
Instructions
(will not
print on
check).
Please let
us know if
this grant
requires
any special
processing.

3. Enter the organization information manually. Click "Manual Grantee." Enter the required information: Grantee Name, Street Address, City, and State, Zip code. Update the grant request data: description (will print on check), amount, select anonymous if you would like your fund name NOT to appear on the check, and include any special instructions for our staff (these will not appear on check). Click "Add to Cart."

Grant Request > Choose Type

PREVIOUS GRANTEE SEARCH GRANTEE **MANUAL GRANTEE**

Grant Request > Choose Type > Search

Enter Grantee information manually

Grantee Name *

Street Address *

City * State * Zipcode *

Email Phone

EIN

* These fields are required.

SUBMIT

Grant Request

Grantee Cactus Cancer Society

Description
39/255 characters

Amount

Anonymous

Recurring

Attachment No file chosen
(or drag and drop anywhere on the page)

Attachment Description

Special Instructions (will not print on check). Please let us know if this grant requires any special processing.

ADD TO CART

- Click "Review Grant Requests." Review the information for each grant. Click "Submit Grant Requests." You will receive confirmation on your screen that the grant(s) has been submitted.

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

Grant Request Cart

REVIEW GRANT REQUESTS

	Recipient	Description	Amount	
DELETE	Cactus Cancer Society	Gala sponsorship. No benefits received.	500.00	EDIT
DELETE	Homeless Children's Foundation of Indian River County Inc.	For summer programs from Andrea and Scott Swift.	500.00	EDIT
DELETE	Treasure Coast Community Health, Inc.	Annual gift from Andrea and Scott Swift.	1,000.00	EDIT
Grant Request Total			2,000.00	

Grant Request Cart

Grantee	Description	Amount	Anonymous
Cactus Cancer Society 2323 Broadway Oakland, CA 94612	Gala sponsorship. No benefits received. Special Instructions (will not print on check). Please let us know if this grant requires any special processing.: I have declined any and all benefits associated with my sponsorship.	\$ 500.00	No
Homeless Children's Foundation of Indian River County Inc. Mrs. Hannah M. Hite 6001 Hwy A1A - PMB 8071 Vero Beach, FL 32963	For summer programs from Andrea and Scott Swift. Special Instructions (will not print on check). Please let us know if this grant requires any special processing.: Hold check at IRCF for pickup.	\$ 500.00	No
Treasure Coast Community Health, Inc. Mrs. Vicki Soule 1555 Indian River Blvd. Suite B-210 Vero Beach, FL 32960	Annual gift from Andrea and Scott Swift. Special Instructions (will not print on check). Please let us know if this grant requires any special processing.: Mail to my home at: 1989 Lavender Haze Dr., Vero Beach, FL 32963.	\$ 1,000.00	No
		Total	\$ 2,000.00

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 GRANT REQUESTS

FUND SUMMARY

CONTRIBUTIONS

GRANT HISTORY

MAKE A GRANT

RESOURCES & DOCUMENTS

Donor Advised Fund Test
CREATE GRANT REQUEST
CART (3)

Grant Request Submitted

[CONTINUE](#)

6. 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.

Grants

Request Date	Status	Recipient	Description	Amount	
03/05/2025	Request	Treasure Coast Community Health, Inc.	Annual gift from Andrea and Scott Swift.	1,000.00	CANCEL
03/05/2025	Request	Homeless Children's Foundation of Indian River County Inc.	For summer programs from Andrea and Scott Swift.	500.00	CANCEL
03/05/2025	Request	Cactus Cancer Society	Gala sponsorship. No benefits received.	500.00	CANCEL
02/27/2025	Pending	Childcare Resources of Indian River	Starfest sponsor. No personal benefits received.	500.00	
02/27/2025	Approved	Homeless Children's Foundation of Indian River County Inc.	Summer Programs from Andrea and Scott Swift	500.00	
02/27/2025	Pending	Ocean Research and Conservation Association, Inc.(ORCA)	Save our Lagoon	500.00	
02/27/2025	Approved	Indian River Community Foundation	Operating Support	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 Immediately"?

"Current Balance" shows the total value of the assets in your fund. "Available to Grant Online Immediately" 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 not if you plan to attend the event or receive any tickets to share with friends or family members.

Tickets, Tables, and Sponsorships

The IRS has clarified its guidelines on bifurcated gifts, defined as a grant where one part is tax-deductible, and another part is not. According to IRS guidance, Donor Advised Funds (DAFs) are prohibited from facilitating bifurcated donations. This restriction is in place because the IRS explicitly prohibits DAF grants from conferring any benefits that exceed incidental benefits to the donor, advisor, or related persons.

You are welcome to make a grant from your DAF to sponsor an event. However, if the sponsorship level includes any goods or services (such as event tickets), you must decline these benefits in order to make the gift using the donor advised fund, as the tickets would be considered more than an incidental benefit. In summary, if you wish to sponsor and attend an event, you can pay the full sponsorship amount from your DAF if you decline any benefits *and* pay for your tickets separately through a credit card or check.

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.