Community Foundation
OF SOUTHWEST INDIANA

Donor & Fund Resources

After you've donated to or established a fund with the Community Foundation of Southwest Indiana, we provide resources to help you track your giving and, if you're a fund founder, representative, or advisor, keep you informed of fund activity.

The **Donor and Fund Portal** offers a way to see your giving history to any fund, view current fund balance and spendable amounts, and review fund statements, including gifts to the fund, at any time. Donor-Advised Fund advisors can also submit grant recommendations directly from the Fund Portal.

Donor and Fund Portal

The Donor and Fund Portal is for all donors and designated fund founders, representatives, and advisors with a primary email address already connected to your profile in our database, or those with a currently active username and password.

Access the Donor and Fund Portal

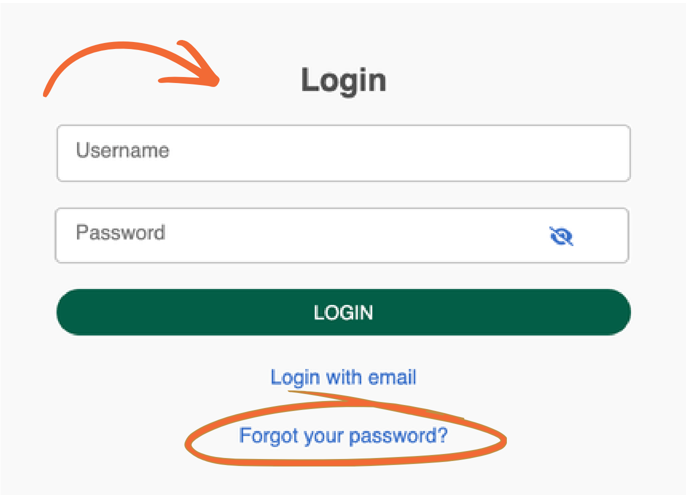
To activate a new Portal account using your primary email, or to log in to an existing account with an established username and password, visit **alliance.fcsuite.com/erp/portal**.

Donor and Fund Portal FAQ

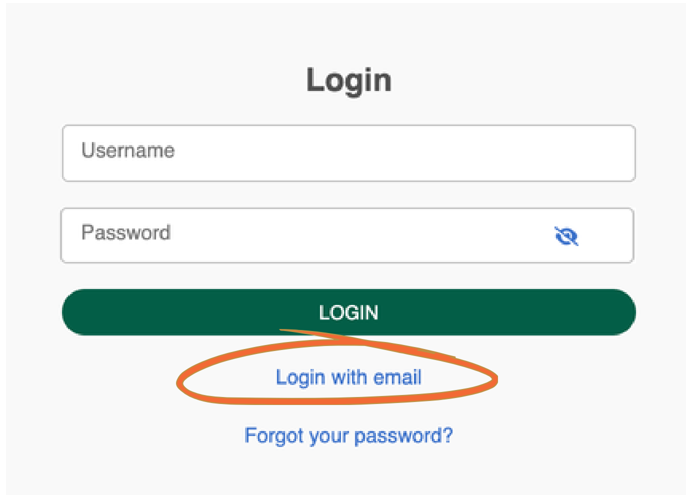
Who Can Utilize The Portal?	**All donors** with a primary email address linked to a donor profile in our database may access the Portal to view their personal giving history, donations to any Foundation fund(s), and to view and pay pledges. **All fund founders, designated fund advisors, and designated fund representatives** have access to the Portal to view current fund balance, spendable amount, fund activity, and fund statements. Donor-Advised fund advisors may submit grant recommendations within the Portal.
How Can I Access My Portal Account?	**Current users** can continue using their username and password on the primary login screen. If you are a current user and have forgotten your password, use the **"Forgot your password?"** option on the login screen to recover or reset it. **New users** and anyone without a username and password should click **"Login with email"** on the login screen. Enter your primary email address.* If it matches the primary email on your profile, you'll receive a verification PIN by email. **The PIN is valid for 6 minutes.** *Your primary email address must already exist in our database. **Not sure if you have an email address on file? Call us! 812.429.1191**

Donor and Fund Portal FAQ (continued)

Current Users



New Users



Is The Portal Secure?

Yes! There are a few different ways the Portal ensures that your personal information, giving history, and fund access are secure:

When you use your primary email, a PIN will be sent to the address you enter. The PIN is additional verification to ensure security. If the email address you entered does not match the primary email address in our system, no PIN will be sent, and you will need to call or **email us** to unlock the account.

Once you have access to the Portal, you can create your own secure username and password for future logins and activate 2-Factor Authentication. We do not have access to personal passwords created by Portal users.

How Do I Navigate the Portal

The Donor and Fund Portal is set up on a tab-access system, with primary section tabs located at the top right of the screen and corresponding section menus appearing on the left. The **Portal User Guide** shows what to expect from the Portal, which tab sections are available depending on your access, and how to navigate the different areas and options.

Portal User Guide

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Access Portal User Guide

Fund Statement Glossary

Refer to this glossary for help understanding item descriptions found on your bi-annual fund statements. All terms represent amounts for the activity period shown at the top right of the statement.

Fund Balance: This line is the fund balance at the start of the statement activity period.

Fund Activity

Income:

- **Contributions to Endowment:** This line is the total of all donor contributions made to the fund's endowed principal during the statement activity period.
- **Investment Activity (Net of Fees):** This line is the income from interest and dividends, unrealized gains from investment value fluctuations, and realized gains from any sales of investments, less fees for portfolio management services during the statement activity period.
- **Matching Contributions to Endowment:** This line is the total amount of matching funds added to the fund's endowment during the statement activity period. (Some internal transfers to principal from other funds may be reflected here.)
- **Other Income (including supplement):** This line is a total of gifts received during the statement activity period to supplement the amount available for grant and scholarship awards. Supplemental gifts are not contributions to the fund principal and are not endowed. (Some internal transfers from other funds may be reflected here.)

Disbursements:

- **Administrative Support Fees:** Total of fees for services provided by the Community Foundation Alliance during the statement activity period.
- **Grants, Distributions & Program:** Total of all grants or scholarships awarded, as well as any other program disbursements during the statement activity period.

Ending Fund Balance: This line is the fund balance at the end of the statement activity period.

Spendable Balance: The maximum amount currently available to grant (may include rollover and supplemental gift amounts).

Grant Request Guide

For Donor-Advised Fund advisors only. How to recommend new grants through the Portal. This guide is a PDF to download to your device for reference.

Access Grant Request Guide

Ways to Grow Your Fund

For donors who have established an endowment fund with the Community Foundation, here are some simple ideas that can continue to help you steadily grow the fund:

- Instead of gifts, ask loved ones to give to the fund on special occasions, birthdays, holidays, or anniversaries.
- Ask if your employer has a matching program for charitable giving. This could double your contributions to the fund.
- Share the fund's Donate link on social media and invite friends and family to donate online. Click on the DONATE TODAY button, find the fund's name, then share the URL.
- Host a private fundraiser to support your fund. Note: Only gifts made directly to the Community Foundation are tax-deductible.
- Deposit "extra money," such as expense checks or tax refunds, into the fund. Every dollar makes a difference!
- Make the Community Foundation a beneficiary in your will, trust, or life insurance policies, with proceeds directed to the endowment fund you established.
- Include a regular contribution to the fund in your monthly or annual budget through direct automated payment (ACH).
- Direct your annual IRA minimum distribution to the fund.

Update Contact Information

Need to update your address or change or add a phone number or email? Please reach out to our team at info@cfswi.org or 812.429.1191.