

FAQ's for Donor Advisors

What is changing?

Our redesigned website not only brings a refreshing modern look, it also includes new functionality to redefine your user experience.

Within the new site, the new portal (Donor-Advised Grant Portal) has been custom built, from the ground up, with the ultimate goals of positively impacting your user experience and creating significant efficiency improvements that will help save you time.

Within the portal, donors (and FA's & CA's on behalf of their clients) will be able to search for eligible organizations to recommend grants. The organizations information will automatically load into the grant recommendation function, so no more having to research EIN's, addresses, and contact information. Grant history will be saved and available for future grant recommendations, so no more having to research more than once. Newly submitted grant recommendations will have a progress tracker, so no more having to inquire on the status. There are also additional features and functionalities to ensure all the information you need is at your fingertips.

Some features will be rolled out on the new website gradually and we will communicate enhancements as they progress. As part of our dedication to improve user experience, we hope that you find our updated website more accessible, with streamlined navigation, optimized features and an improved layout.

When is this change effective?

The new website (including the portal) will replace the existing website on September 16, 2020.

Is the website address (URL) changing?

No. One of the few things not changing is our website address:

www.giftfund.org

The 'Donor-Advised Grant Portal' is accessible within our newly designed website.

Do I need to use a specific web browser?

No. Our new website, www.giftfund.org and the 'Donor-Advised Grant Portal' are easily accessible using all major web browsers (Google Chrome, Microsoft Edge, Safari, Firefox), although we've had the best experience using Google Chrome. Please ensure all browser updates are installed to provide the most seamless experience.

Is the new site optimized for mobile devices?

Yes. You may access the website using your Apple or Android mobile devices including phones, iPads, tablets, and the like. Simply connect to the internet using your device's browser, and go to www.giftfund.org.

How does this benefit me?

The newly designed 'Donor-Advised Grant Portal' was created to enhance your online experience, save you time, and to eliminate frustrations of prior functionality limitations. We want you to love using the new website and we're committed to continually making additional improvement to further enhance your experience.

Are there any costs associated with this change?

No. There are no additional costs/fees associated with using the new website or new portal. AGF made a focused investment with the ultimate goal of improving user experience.

The old website had a feature where I could login to see investment detail on a DAF, is this feature being eliminated?

No. AGF offers the ability to view investment detail through RBC Trust Company (Delaware) Limited's portal. This feature is still available on the new website. You may access the 'Donor-Advised Investment Portal' by visiting our website at www.giftfund.org Click on 'LOG IN' (top right corner of the website), select 'Donor-Advised Investment Portal'.

Is the login information the same for the Donor-Advised Grant Portal and the Donor-Advised Investment Portal (see above question)?

If you currently use the 'Donor-Advised Investment Portal', you have the option to reset your login information on the 'Donor-Advised Grant Portal' at any time, to match.

How do I get to the Donor-Advised Grant Portal?

You may access the 'Donor-Advised Grant Portal' by visiting our website at www.giftfund.org Click on 'LOG IN' (top right corner of the website), select 'Donor-Advised Grant Portal'. Alternatively, you may also access the 'Donor-Advised Grant Portal' from the homepage by clicking on 'MAKE GRANT REQUEST' (top right corner of the website, directly to the left of 'LOG IN').

Do I need a password/account to access the new Donor-Advised Grant Portal?

Yes. You will establish your own unique Username and Password the first time you login to the 'Donor-Advised Grant Portal', by selecting 'Create a login' on the 'Donor-Advised Grant Portal' login screen. Please make sure that you have your AGF Fund account number available at the time of initial login.

Our DAF has two Donor Advisors (ex. Husband and Wife), do we each need our own separate logins?

Both Donor Advisors may have their own separate logins, or they may use the same login if they wish. The Grant History will include activity from both Donor Advisors, even if they have separate logins. The Grant History will also show grant recommendations made by the Financial Advisor for the DAF. (ex. If one Donor Advisor makes a grant recommendation through their own personal login, the other Donor Advisor, and the FA, will be able to view that specific grant recommendation through their own personal logins.)

How do I submit a grant recommendation?

Once logged in to the 'Donor-Advised Grant Portal', select 'Make a Grant', then select 'SEARCH FOR CHARITIES'. You may search by Charity Name or tax ID. Follow the remaining prompts to submit the grant recommendation.

What happens if the charity I search for is not found in the search function?

If this occurs, you may still recommend a grant to the charity by selecting 'ADD NEW CHARITY' and entering the information. The AGF Team will conduct further research and inform you of the results.

How do I check the status of a grant recommendation once I submit a request?

Once logged in to the 'Donor-Advised Grant Portal', select the 'Grant History' tab, find the specific grant recommendation, and look under the 'STATUS' column.

If a DAF already has an existing reoccurring grant recommendation (ex. annual) do I have to resubmit the recommendation again?

No. All reoccurring grant recommendations will continue as previously scheduled.

Can I see the history of charities that have been recommended in the past?

All grant recommendations that you have requested after September 16, 2020, will be viewable from the 'Grant History' tab.

If I want to give to a previously recommended charity, do I need to search for the charity again?

No. Once logged in to the 'Donor-Advised Grant Portal', from the 'Make a Grant' tab, check the box next to the charity name, then select 'CONTINUE TO NEXT STEP'.

Can I see the DAF value?

Yes. Once logged in to the 'Donor-Advised Grant Portal', the DAF value is listed under the DAF name. The DAF value listed will not reflect grant recommendations which are either in progress or that have been finalized since the date listed under 'value as of' date.

Can my Financial Advisor submit grant recommendations on my behalf?

Yes. Your Financial Advisor will have the ability to make grant recommendation on your behalf. You will be notified when any grant recommendations are made by your Financial Advisor.

Does this change the communication/notification process between me and AGF?

Yes. You will no longer need to confirm that you made grant recommendations via email.

Which portal provider did you select to offer this service?

None. The 'Donor-Advised Grant Portal' was custom built, from the ground up, with the ultimate goals of positively impacting the user experience and creating significant efficiency improvements that will help save you time.

Who do I contact if I have additional questions regarding the new website and the Donor-Advised Grant Portal?

*Additional questions may be directed to the American Gift Fund Team either by email or phone:
Email: americangiftfund@cnb.com Phone: (800) 441-7698.*