

Quick Reference Guide for Donor Advisors

Creating a login

1. Enter the following URL in a browser: www.giftfund.org
2. Select the 'LOG IN' Button at the top of the screen
3. Select 'DONOR-ADVISED GRANT PORTAL' (See Example #1)
4. Select 'Create a Login' (See Example #2)
5. Fill out the fields presented on the form, then select 'CREATE LOGIN'.

Grant Recommendations

1. Once logged into the Donor-Advised Grant Portal, select 'Make a Grant'
2. Select 'Search for Charities' (See Example #3). Enter the Tax ID# or name of the charity. Choose the correct charity from the listing by selecting 'Select'. The screen will populate with the charity information.
3. If you have additional charities to add, select 'Search for Charities' again and select the correct charity. Once you are completed adding all the charities you wish to donate to, select 'Continue to Next Step'.
4. Enter the amount of each grant. The minimum grant recommendation is \$250.00. Select a distribution option (Lump Sum, Quarterly, Annually).
5. Check the box only if you wish to remain anonymous.
6. Select the purpose of the grant using the drop down (See Example #4) *This WILL be included on the grant letter.*
7. Enter any special instructions for the grant recommendation in the Special Instructions for the AGF Team. *This will NOT be included on the grant letter.*
8. Select the box to agree to the statements.
9. Select 'AGREE AND SUBMIT GRANT REQUESTS'. (See Example #5)

Grant History

1. This section keeps track of all the grant recommendations that you have submitted.
2. Please note the 'Status' column above. You can check this section at any time to check the status of your grant recommendation.

Fund My Account

1. This section is for when you choose to contribute to the American Gift Fund and acts as a notification method, not a transaction method.

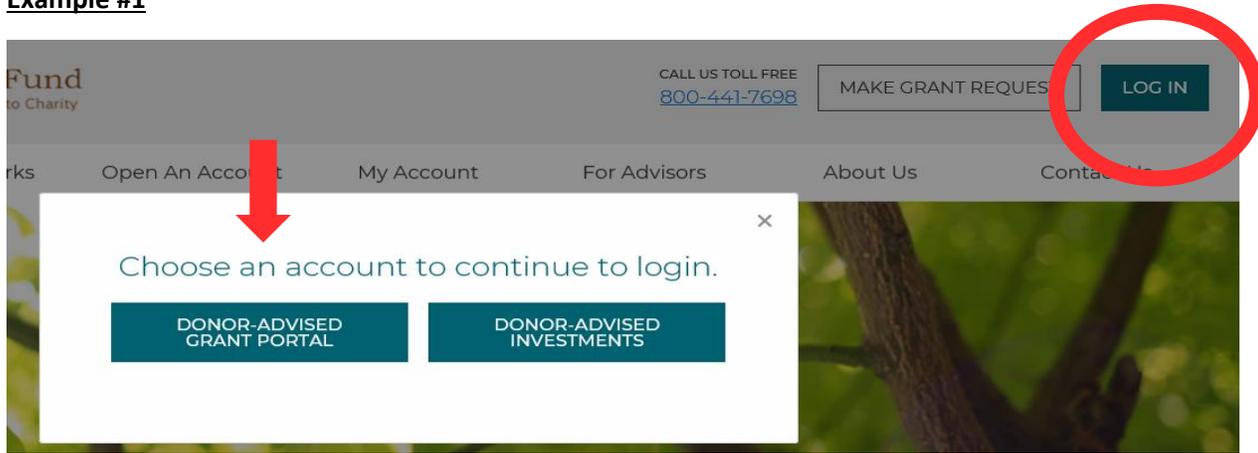
Successor Advisors

1. This section is for selecting a successor donor adviser that will have the authority to recommend grants at the time of the death of the Donor Advisor(s).

Grant Recommendation Process

1. The Donor Advisor(s) submits a grant recommendation via www.giftfund.org.
2. The Donor Advisor(s) will receive an automated email confirming that the AGF Team has received the request.
3. The AGF Team will perform the necessary research.
4. The grant recommendation will be added to the next Board of Directors grant approval meeting. Meetings are currently held weekly on Tuesdays. To be included in Tuesday's meeting, grant recommendations must be submitted by the prior Monday, by 10am EST. If funding is received by Thursday, the check will normally be mailed by end of day on Friday.
5. The Donor Advisor(s) will receive an email indicating the grant was completed. A copy of the letter will be attached for reference.

Example #1



Example #2

Log in to your American Gift Fund Account

Username

Password

LOGIN

[Create a login](#) | [Forgot Password?](#)

Create a log in for your American Gift Fund Account

AGF Account Number

First Name

Last Name

Email Address

Which are you?
 Donor
 Financial Advisor
 Client Associate

Username

Password

Confirm Password

CREATE LOGIN

Example #3

Make a Grant

Grant History

Fund My Account

Angela Clark Foundation Fund

Account #111222336

Value as of Never: **\$123,456.00***

* Account Balance may not reflect current transactions

Request a grant to a qualifying charity.

SEARCH FOR CHARITIES

ADD NEW CHARITY

ADD A CHARITY TO CONTINUE

Example #4

Make a Grant

To: American Cancer Society, Inc.

Grant Amount:

Minimum \$250

Purpose of Grant:

Choose from one of the following options.

- Lump sum, one-time grant
- Annually Recurring
- Quarterly Recurring
- Monthly Recurring
- Pay % of account value annually

Please check here if you do not wish your identity disclosed to the charity.

Example #5

Special Instructions for the AGF Team

Agreement

- I have read the [American Gift Fund Disclosures](#).
 - The charities above will not provide me with any benefits in exchange for a grant. Impermissible benefits include membership tickets to charity events, or other items which have monetary value.
- I will disregard any tax receipt I receive, because neither I nor anyone else is entitled to an income tax charitable deduction at this point.

I agree to the statements above.

Grants can only be made to IRS-qualified public charities that are exempt under section 501(c)(3) of the Internal Revenue Code.

AGREE & SUBMIT GRANT REQUESTS