

Commonwealth DFX User Guide

# Donor User Guide



## Commonwealth DFX User Guide

# Navigation

### Descriptions

#### Quick links

Quick links are available for the most common actions; recommending a grant, planning a contribution or downloading forms.

#### Fund details

Click to expand for full details on a fund.

#### Recent transactions

Listed are the three most recent contributions and grants for a fund. Click on any transaction for more details.

#### Charitable impact

DFX shows you the impact of your giving by breaking grants into philanthropic categories.

#### Questions?

Contact us toll-free at 888-487-8490 or at CFNDAF@reninc.com with questions on your RCF donor-advised fund.

The screenshot displays the user interface for a donor-advised fund. At the top, the 'Rock Family Fund' is shown with a fund value of \$16,451,120.05. Below this, there are navigation tabs for 'Fund Details', 'Contributions', 'Grants', 'Investments', 'Documents', and 'More'. The 'Fund Details' section is expanded, showing 'RECENT CONTRIBUTIONS' (e.g., Graco Inc for \$5,000.00) and 'RECENT GRANTS' (with a 'Recommend a Grant' button). A 'DOCUMENTS' section shows a 'Copy of Original Online Application (PDF)'. To the right, there are options for 'Email Notifications' and 'Add a Grant Goal or a Contribution Goal'. Below this, the 'The Mr. Fred Rogers Family Charitable Fund' is shown with a 'GRANT CATEGORY' bar chart. The chart shows: Health Care (57.6%), Education (37.9%), and Employment (4.5%). A 'Your Charitable Impact' box states: 'Your giving has real impact! Here's how your grants are supporting the cause you care about most.' Below the chart, there are 'RECENT CONTRIBUTIONS' (e.g., ABC Bank for \$23,745.94) and 'RECENT GRANTS' (e.g., Charity #1 for \$300.00).

*For illustrative purposes only.*

## Commonwealth DFX User Guide

# Making a Grant

### Descriptions

#### Get started

Access the grant recommendation screen through the quick link or the navigation bar.

#### Charity search

Search our database of over a million charities to find one to receive the grant.

#### Select grant recipient

Choose from your favorite charities, manually enter information or search GuideStar to select your grant recipient.

#### Enter the grant amount

Be sure you meet the minimum indicated to the right of the box.

#### Grant timing

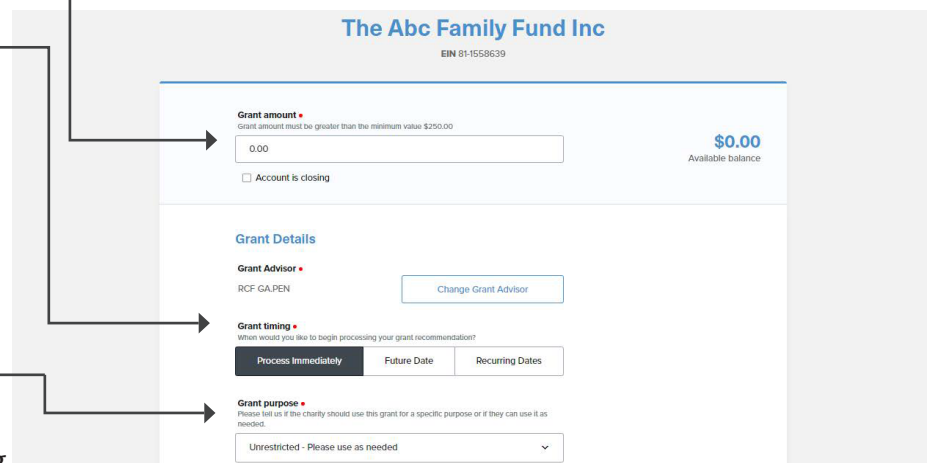
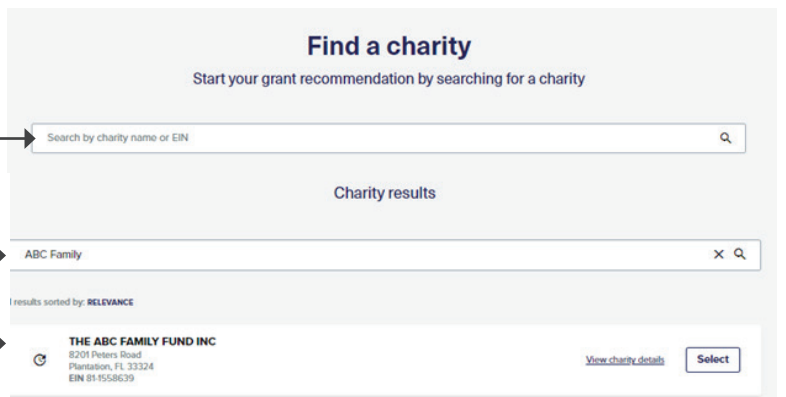
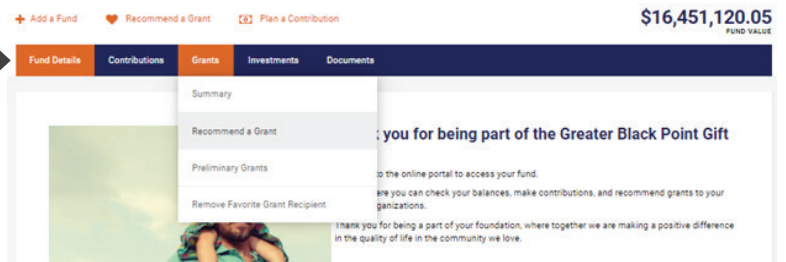
Process your grant immediately, on a future date or create a recurring grant schedule.

Please note that a future date selection indicates the date the grant review will begin and not the date of payment.

#### Grant purpose

Would you like funds to be restricted to a specific purpose? You can do so by entering it here.

Please note that some special purposes require additional review.



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## Commonwealth DFX User Guide

# Making a Grant

### Descriptions

#### Dedication

RCF allows you to choose if the grant will be dedicated to someone to honor them or their legacy.

#### Acknowledgment

RCF allows you to choose how you are recognized for the grant. Issue it in the name of the fund, the primary donors. Grants can also be issued anonymously.

#### Review grant

Review the grant details before submitting the grant.

#### Review and submit

Read and acknowledge the terms of the grant. When ready submit the grant for processing.

The screenshot displays the grant submission process in several stages:

- Dedications:** A question "Would you like to dedicate this grant to someone?" with radio buttons for "Yes" and "No".
- Acknowledgements:** A question "How would you like to be acknowledged in the grant correspondence with the charity?" with a dropdown menu set to "Fund Name Only" and a "Change Acknowledgement" button.
- Delivery Method:** A note stating "Your grant check will be mailed to the charity."
- Charity address selection:** A dropdown menu for "Available mailing addresses" and an "Attention To" field with a note: "Entries to this field will display under the charity name for grant details, grant checks, and grant letters but will not be a permanent addition to the address." Below is a text input field "Please enter a name".
- Shipping method:** A dropdown menu set to "Standard".
- Review your grant:** A summary screen titled "Review your grant" with the message "Almost done! Let's review and confirm your recommendation." It shows a "PROCESS IMMEDIATELY" badge, a grant amount of "\$250.00", the charity name "Habitat for Humanity", and EIN "38-300410". It includes a note "Mail a grant check to the charity" and an "Add Special Instructions" field. At the bottom are "Save for later", "Cancel", and "Submit grant" buttons.
- Agreement:** A section titled "Agreement" with the text "I have read and agree to the terms below:" followed by four checkboxes for terms and conditions.

The status of your grant submission can be viewed under the 'Grants Listing' tab.

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## Commonwealth DFX User Guide

# Finding Documents

### Descriptions

#### Documents tab

Clicking the Documents tab will take you to the Documents report page.

#### Year

Documents are available based on the applicable year.

#### Grant letter

View grant letters sent to charities with processed grants.

#### Contribution letter

Contribution letters can be used to supplement your tax preparation.

#### Statements

View quarterly statements for the account.

The screenshot displays the user interface for 'The Family Charitable Giving Fund'. At the top, there is a navigation bar with tabs for 'Fund Details', 'Contributions', 'Grants', 'Investments', and 'Documents'. The 'Documents' tab is currently selected and highlighted in orange. Below the navigation bar, the 'Documents' section is visible, featuring a 'Year' dropdown menu set to '2020' and a 'Manage Statements' button. The main content area lists four document types: 'GRANT LETTER' (with a link to 'Grant Letter'), 'CONTRIBUTION LETTER' (with a link to 'Contribution Letter'), 'WELCOME LETTER' (with a link to 'Welcome Letter'), and 'STATEMENT' (with a link to 'Test Statement'). The top right of the page shows the fund's value as '\$123,950.80' and the grantable balance as of 8/19/2020 as '\$123,950.80'. A 'Change Account' button is also present in the top right corner.

## Commonwealth DFX User Guide

# Understanding Your Statement

### Descriptions

#### Date

Date shows the quarter to which the statement applies.

#### Fund information

Fund information shows the name of the fund, the fund's code, and the fund's account number.

#### Account summary

Account summary shows the balance of the account at opening and close of the statement's quarter.

#### Account holdings

Account holdings provides a breakdown of the beginning and ending balances for underlying investments within the fund.

#### Contributions to account

A detailed listing of contributions and grants within the account during the quarter is shown in "Contributions to Account" and "Grants from Account."

**Account Statement**  
October 1, 2017 - December 31, 2017

**The Charles Walters Family Fund**  
Account Code: W  
Account Number:

To access your online account information, visit us @ <https://xyz.donorfirstx.com>.

**Account Summary**

<b>Beginning Balance (October 1, 2017)</b>	<b>\$0.00</b>
Contributions to Account	\$51,192.00
Grants Paid from Account	(\$8,575.00)
Market Value Changes	(\$351.00)
Interest and Dividends	\$0.00
Realized Gains (Losses)	\$0.00
Account Fees	\$0.00
<b>Ending Balance (December 31, 2017)</b>	<b>\$42,266.00</b>

**Account Holdings**

Description	Beginning Balance	Change in Account Balance	Ending Balance	% of Account
Stock # 1	\$0.00	\$11,437.00	\$11,437.00	27.06%
Stock # 2	\$0.00	\$12,642.00	\$12,642.00	29.91%
Stock # 3	\$0.00	\$18,187.00	\$18,187.00	43.03%
<b>Total</b>	<b>\$0.00</b>	<b>\$42,266.00</b>	<b>\$42,266.00</b>	<b>100.00%</b>

**Contributions to Account**

Date Received	Description	Quantity	Amount
12/28/2017	Stock # 1	200.000	\$13,781.00
12/28/2017	Stock # 2	350.000	\$22,169.00
12/28/2017	Stock # 3	200.000	\$15,242.00
<b>Total</b>			<b>\$51,192.00</b>

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## Commonwealth DFX User Guide

# Updating Your Profile

### Descriptions

#### User preferences

Hover over your name to change your email, password, email security questions and to customize email notifications.

#### Change password

Change your password using the parameters set by the organization.

#### Change security question

Update the security question to log in to your account if you lose your password.

#### Update email notifications

Opt-in to receive e-notifications regarding account activity.