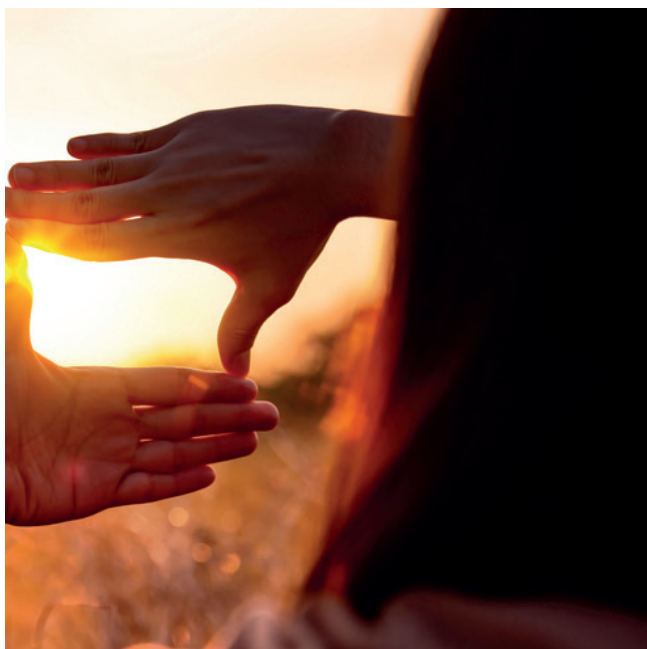


CCGF DFX User Guide

Donor User Guide



CCGF DFX User Guide

Homepage Tour

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 844-757-3521 or at CCGF@reninc.com with questions on your RCF donor-advised fund.

The screenshot displays the CCGF DFX homepage. At the top, the 'Rock Family Fund' is highlighted with a 'Change Fund' button. Below this, a navigation bar includes links for 'Add a Fund', 'Recommend a Grant', and 'Plan a Contribution'. The fund's value is shown as '\$16,451,120.05'. The main content area is divided into sections: 'RECENT CONTRIBUTIONS' (listing a contribution from Graco Inc. for \$5,000.00), 'RECENT GRANTS' (with a 'Recommend a Grant' button), 'DOCUMENTS' (listing a 'Copy of Original Online Application (PDF)'), and 'Email Notifications' (with a 'Change Settings' button). Below these, the 'The Mr. Fred Rogers Family Charitable Fund' is shown, featuring a 'GRANT CATEGORY' bar chart and a 'Your Charitable Impact' section. The bar chart shows the following data:

Grant Category	Percentage
Health Care	57.6%
Education	37.9%
Employment	4.5%

The 'Your Charitable Impact' section states: 'Your giving has real impact! Here's how your grants are supporting the cause you care about most.' Below this, there are two tables: 'RECENT CONTRIBUTIONS' and 'RECENT GRANTS'.

RECENT CONTRIBUTIONS	
12/27/2020 ABC Bank	\$23,745.94
12/23/2016 ABC Bank	\$27,325.57
12/23/2011 ABC Bank	\$20,070.00

RECENT GRANTS	
09/04/2019 Charity #1	\$300.00
08/21/2018 Charity #2	\$2,000.00
08/02/2018 Charity #3	\$5,000.00

CCGF 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 in the text above the box.

Grant timing

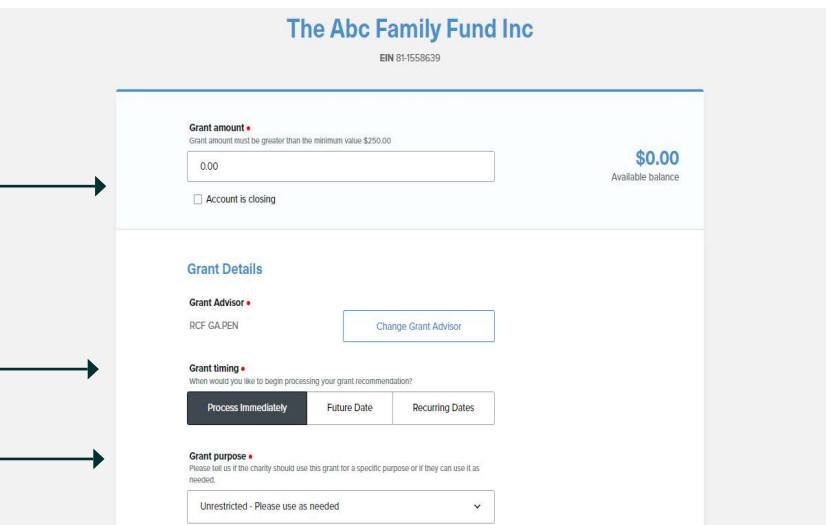
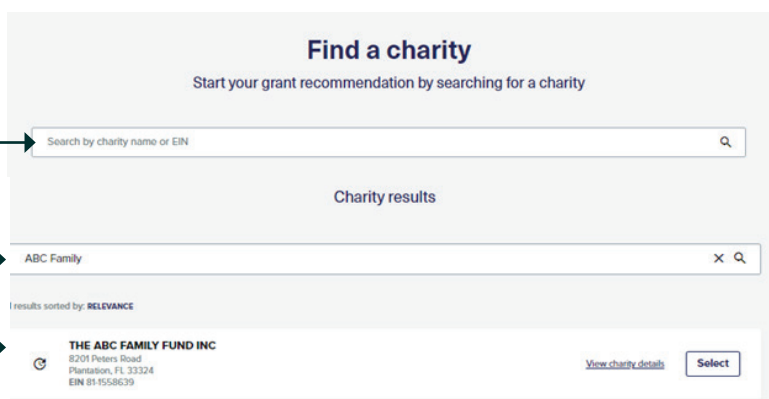
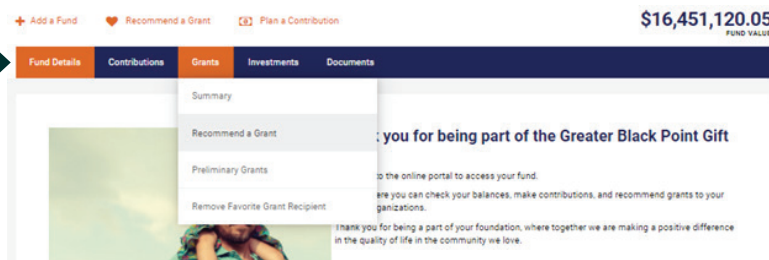
Process your grant immediately, on a future date or create a recurring grant schedule.

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 the funds to be restricted to a specific purpose? Select a purpose from the dropdown. If you would like to add your own purpose, select "Other" from the dropdown and you will be able to write in your purpose in the "Describe grant purpose" box.

Please note that the charity will see this information on the grant letter.



CCGF DFX User Guide

Making a Grant

Descriptions

Dedication

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

Acknowledgment

CCGF 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. The default is "Fund Name Only". *Please note, the charity will see this information on the grant letter.*

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. Please note that the "Add Special Instructions" field is only for instructing the CCGF team if you would like the grant sent overnight (There is a \$25 fee for sending the check via overnight delivery). These instructions will not be seen by the charity.

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

Dedications

Would you like to dedicate this grant to someone?

☐ Yes ☒ No

Acknowledgements

How would you like to be acknowledged in the grant correspondence with the charity?

Fund Name Only [Change Acknowledgement](#)

Delivery Method

Your grant check will be mailed to the charity.

Charity address selection

Available mailing addresses

8201 Peters Rd
Plantation, FL 333243265

Attention To

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.

Please enter a name

Shipping method

Standard

[Cancel](#) [Review grant](#)

Review your grant

Almost done! Let's review and confirm your recommendation.

PROCESS IMMEDIATELY

\$250.00

Habitat for Humanity
EIN 38-300410

Mail a grant check to the charity

[Add Special Instructions](#) [Edit](#)

Agreement

I have read and agree to the terms below:

☐ I affirm that all information in this form is true to the best of my knowledge, and that neither I nor my family will benefit in any way from this grant.

☐ I affirm that neither I nor any related party control the governing board of any supported organization in the case of a grant to a supporting organization.

☐ I understand that this information represents a grant recommendation that I am making to the sponsor of my account and not a final grant decision.

☐ I affirm that the grant does not fulfill a pre-existing binding pledge to the recommended charitable organization, unless otherwise disclosed within this grant submission.

[Save for later](#) [Cancel](#) [Submit grant](#)

CCGF DFX User Guide

Finding Documents

Descriptions

Documents tab

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

Year

Documents are available based on the applicable year.

Grant letter

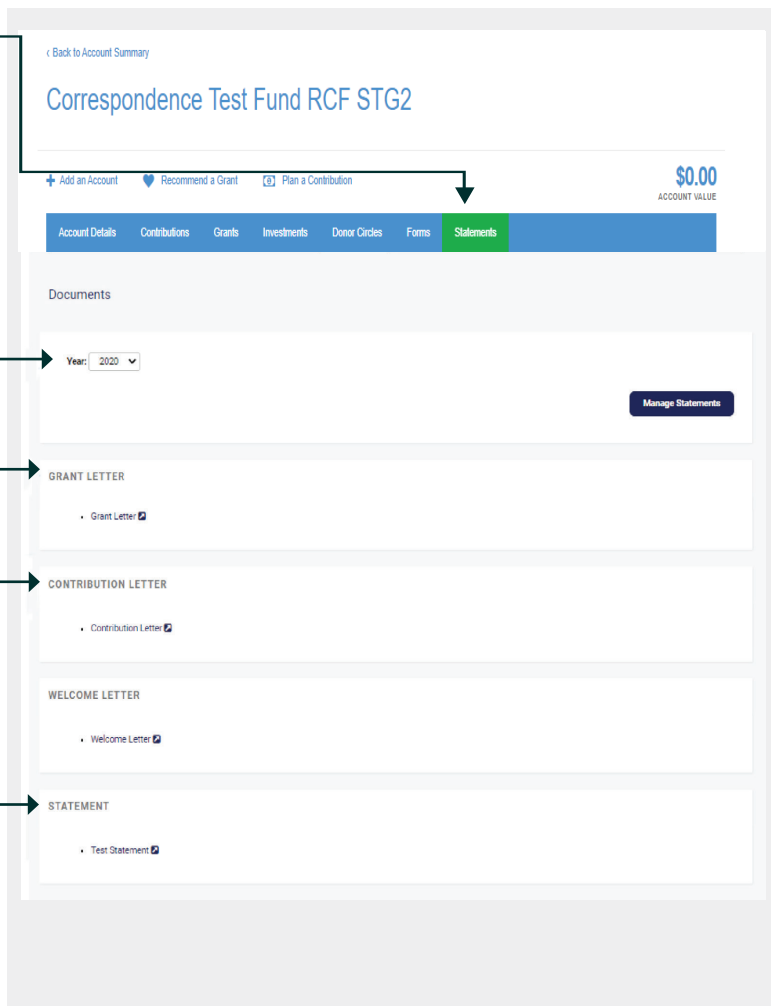
View grant letters sent to charities with processed grants.

Contribution letter

Contribution letters can be used to supplement your tax preparation.

Statements

View quarterly statements for the account.



CCGF 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: WALTER99
Account Number: 50000

Charles Walters
400 N. Main St.
Brownsville, TX 77801

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

Account Summary

Beginning Balance (October 1, 2017)	\$0.00
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
Ending Balance (December 31, 2017)	\$42,266.00

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%
Total	\$0.00	\$42,266.00	\$42,266.00	100.00%

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
Total			\$51,192.00

CCGF 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.

The screenshot displays the user profile update page for 'Doe, John'. At the top right, there is a user profile icon and the text 'Doe, John' and 'Log Out'. A dropdown menu is open, showing options: 'Change Email', 'Change Password', 'Change Security Questions', and 'Email Notifications'. Below this, the 'Change Password' section is visible, with fields for 'Enter Your Current Password', 'Create Your New Password', and 'Confirm Your New Password'. A blue box on the right lists password requirements: 'Your password must meet these minimum requirements: Must be a minimum of 6 characters in total length, Must be a minimum of 1 capital letters, Must be a minimum of 1 lower case letters, Must be a minimum of 1 numbers'. A 'Change Password' button is at the bottom right of this section. The 'CHANGE SECURITY QUESTION' section follows, with a note: 'We do not have a security question and answer on file for you. You will need to provide them before continuing on.' It includes fields for 'Security Question' (a dropdown menu), 'Answer to the Security Question', and 'Confirm Answer'. An 'Accept Changes' button is at the bottom right. The 'UPDATE YOUR EMAIL NOTIFICATIONS' section is at the bottom, with checkboxes for 'Contribution Received', 'Correspondence Posted', 'Grant Approved (Posted)', 'Grant Paid', and 'Statement Posted' (which is checked). A 'Save Changes' button is at the bottom right.