



**COMMUNITY  
FOUNDATION**  
*of Northern Nevada*

# **Fund Advisor Portal Guide**

**Name:**

**Username:**

**Password:**

# Fund Advisor Portal Guide

## Fund Advisor Portal

As a fundholder at the Community Foundation of Northern Nevada, you have the ability to access your fund information online through our Fund Advisor Portal. Within the portal, you can easily check your fund balance, view and download quarterly market summaries, request and track grants, add to your fund, and more. The Fund Advisor Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

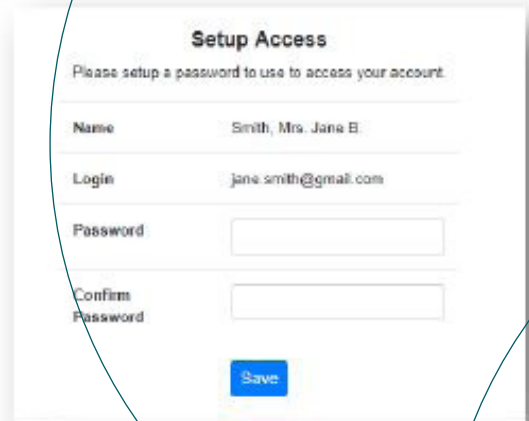
### Initial Login Process and Creating Your Account

You will receive an email from the Community Foundation of Northern Nevada with a custom invitation link to create your account in the Fund Advisor Portal. Your username will be the email address that we have on file. If you want to change your username, please get in touch with our Donor Relations Team at (775) 333-5499. When you create your password, we recommend using random words, capital letters, and numbers with special characters to keep your account secure.

### Returning Users

To access the Fund Advisor Portal, visit the Community Foundation of Northern Nevada's website at NevadaFund.org and click Fund Advisor Portal on the top navigation bar. You will be redirected to a login page where you will enter your unique username and password. If you forget your login credentials, please contact the Donor Relations Team at (775) 333-5499 or info@nevadafund.org. While our staff can assist you in resetting your password, please understand we cannot access user passwords and cannot look them up for you. Also, please keep in mind that password resets may take up to one business day for our team to reset for you.

Note: The Fund Advisor Portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact our Donor Relations Team at (775) 333-5499 or info@nevadafund.org.



**Setup Access**  
Please setup a password to use to access your account.

Name: Smith, Mrs. Jane B.

Login: jane.smith@gmail.com

Password:

Confirm Password:

[Save](#)



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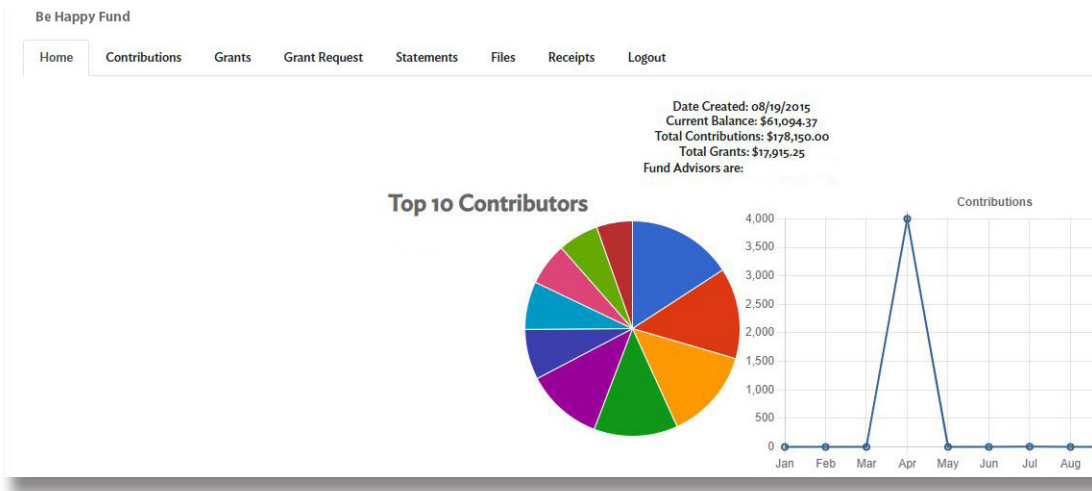


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## Fund Advisor Portal Features

Once you are logged in, your fund's homepage will appear. *If you manage multiple funds, you will see a Choose Fund menu. Choose the fund you wish to review from the drop-down menu.*



The tabs at the top of the page display different features available to you as a fund advisor:

### Home

Your homepage is a quick snapshot of your fund's most recent activity. It will show your fund's current balance, all fund advisors, recent contributions, and recent grant history.

### Contributions

This tab shows all donations made to your fund. Clicking on a contributor's name will bring up their history of contributions, including date of gift, type, and amount.

### Grants

This tab shows the history of grants awarded from your fund, including date, organization name, purpose, and amount.

### Grant Request

This tab allows you to request a grant from your fund and see the status of your recent grants.

### Statements

This tab shows your fund's quarterly market summaries. Next to the summary you wish to view, click Print, and the system will generate a PDF in a new window that you may view, save, or print.

### Files

This tab will show any viewable files regarding your fund. At this time, fund agreements and other confidential documents are unavailable through the Fund Advisor Portal. Please contact your Philanthropic Advisor if you would like any documents added to your account.

### Receipts

This tab shows your recent receipts.

### Logout

Clicking Logout will automatically log you out of the Fund Advisor Portal. If you do not log out this way, you will be automatically logged out at midnight.

# Submitting a Grant Request

To recommend a grant from your fund, click the Grant Request tab. Recommending a grant is a three-step process:

## 1. Choose a Grantee in one of four ways:

**A. Choose from Previous Grantee** - Choose the organization you want to support from this drop-down list of organizations you previously supported.

**B. Other Foundation Funds** - Choose a fund you want to support from this drop-down list of funds at the Community Foundation of Northern Nevada.

**C. Search for Other Grantees** - Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations. Once you find the organization you want to support, click **Create Request**.

**D. Enter Grantee Information Manually** - If you can't find the organization you wish to support, you will need to manually enter the organization's information: name, address, and phone number. Once you enter this information, click **Submit**.

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details, including grant description and amount.

## 2. Grant Details

Please provide the grant purpose and any special handling in the description field. Keep in mind that if you don't designate a specific grant purpose, your grant will be earmarked for General Support. A \$100 minimum is required for each grant request. You can also choose to remain anonymous by selecting the Anonymous checkbox. Once you are finished entering this information, click **Review**.

## 3. Review and Submit Request

Review your grant request details and click Submit Request. Once you submit the request, you will receive an automated confirmation email, and our staff will begin processing.

**A** Grantees you have given to in the past

**B** Other foundation funds

or

**C** Search for other Grantees

Name

City

State

Search

or

**D** Enter Grantee information manually

Name \*

Address \*

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Grant Request

Grantee Truckee Meadows Community College Foundation

Additional Grantee Contact

Description

Amount

Anonymous

Recurring

Attachment  No file chosen (or drag and drop anywhere on the page)

Attachment Description

Additional Information

Home Contributions Grants Grant Request Statements Files Receipts

Review New Grant Request

Grantee Truckee Meadows Community College Foundation

Description General support

Amount \$ 100.00

Anonymous No

Additional Information

By clicking "I agree," I/we understand that the Board of Trustees of the Community Foundation of Northern Nevada will be guided by the Articles of Incorporation and the Bylaws creating the Foundation and the general grant-making policies of the Foundation. Disbursements or grants from the Fund do not represent commitments on a pledge or any other financial obligation. Donor advisors may not receive tickets for dinner or performances or other compensation benefits in excess of \$25 per IRS regulations.

## Viewing Grant History

To review your most recent grant history, click the **Grant Request** tab.

Grants				
Date	Status	Recipient	Description	Amount
08/28/2018	Pending	ArtsinStark	General Support	100.00

Under the Status column, you will see one of six statuses for each grant:

**Request** means that your grant request has been sent to our staff. If you want to cancel a pending grant request before it is processed, click the yellow Cancel button.

**Canceled** means that your grant request has been canceled.

**Pending** means that our staff is currently processing your grant request.

**Approved** means that your grant request has been approved but not yet paid.

**Paid** means that your grant request has been approved and a check has been sent to the organization.

**Completed** means that your grant request has successfully been fulfilled.

## Email Alerts

We will alert you via email every time a donation is made to your fund, or a grant has been awarded from your fund. These alerts can be canceled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations. If you would like to cancel alerts, please contact the Donor Relations Team at (775) 333-5499 or [info@nevadafund.org](mailto:info@nevadafund.org).

## Questions

If you have any questions about the Fund Advisor Portal, contact our Donor Relations Team at (775) 333-5499 or [info@nevadafund.org](mailto:info@nevadafund.org).

## Fund Advisor Portal Frequently Asked Questions

### How often are quarterly market summaries posted?

Quarterly market summaries are posted the month immediately following the end of the quarter. You will be notified via email when your summary is ready to be viewed in the Fund Advisor Portal. If you are not receiving these notification emails, please contact the Donor Relations Team at (775) 333-5499 or [info@nevadafund.org](mailto:info@nevadafund.org).

### How do I change my password?

If you need to change your password, please contact our Donor Relations Team at (775) 333-5499 or [info@nevadafund.org](mailto:info@nevadafund.org). While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you. However, we'd be happy to reset it for you!

### How long does it take for my recommendation to be processed?

Generally, recommendations are processed within five business days.

### Who can I make recommendations to?

Entities eligible for grants include 501(c)(3) nonprofit organizations, educational institutions, governmental bodies, and religious organizations.

### What is the minimum amount for grant recommendations?

A \$100 minimum is required for each grant recommendation.

### Are there other ways to submit a fund advisor recommendation?

Yes, recommendations may also be submitted through email to your Philanthropic Advisor.

**Lyndsey Crossley** [lcrossley@nevadafund.org](mailto:lcrossley@nevadafund.org)

**Lauren Renda** [lrenda@nevadafund.org](mailto:lrenda@nevadafund.org)

Please include the grantee name, grant amount, grant purpose, and any additional instructions in your email. Your Philanthropic Advisor will confirm receipt of your recommendation.

### How do I know if a grant I recommended has been issued?

Your Fund Advisor Portal home page will list your most recent paid grants. Or, click on the Grant Request tab to see the status of your grant request.

### Who do I contact if I'm having issues with the Fund Advisor Portal?

If you have any questions or are experiencing issues with the Fund Advisor Portal, please contact our Donor Relations Team at (775) 333-5499 or [info@nevadafund.org](mailto:info@nevadafund.org).

