LOG IN TO YOUR FUND DASHBOARD  http://www.InFaithFound.org/fundlogin

Please log in to our secure site to view and manage your fund, or apply for grants and scholarships. We welcome you to contact us with questions, concerns, comments or for help with online access. For questions about scholarship and grant applications, please email us.

UPDATES:
Daily fund values on your fund dashboard are estimates based on investment performance as it becomes available. An accurate fair-market value of your fund is available 10 -15 business days following month-end and can be accessed here through the PDF version of your statement.

NEWS
Stay up to date with InFaith news and giving resources. Visit Donor News at inFaithFound.org for resources on how to engage your family in giving, how to make additional gifts and how to help ensure all have access to clean water through InFaith’s Creation Care Initiative. If you have an endowment fund at InFaith, visit Endowment News.

LOGIN
User

Enter Username
Password

Enter Password
LOGIN
Reset Password

Forgot Password? First time logging in? Start here

New users: follow this link for first time login.

Password Requirements:
· Between 6-10 characters
· Includes at least 2 letters
· Includes at least 2 numbers
FIRST-TIME LOGIN INSTRUCTIONS

You will receive your username in a letter or email from InFaith

Login to your Fund Dashboard
Username: XXXXXXX

A second method of authentication will enable us to provide better security regarding access to your fund.

You can select to receive a text based authentication code
- OR-
You can select to receive a phone call and a verbal authentication code

Enter Username

Enter a phone number that you can receive a verification code

Select an authentication method

- Text Message
- Call

Send Verification Code

Cancel
**NAVIGATING YOUR FUND DASHBOARD**

Your Fund Dashboard has several sub-pages with detailed information.

These pages can be accessed by:

A. clicking on the menu, “Fund Dashboard”
B. Next click on one of the sub-page menus to load the page for that section.

**MOBILE FRIENDLY**

Each page on your Fund Dashboard has a button that will change the site layout to a more mobile-friendly layout.

Click once to turn this feature on. Click again to return to a non-mobile layout.
Daily fund values on your fund dashboard are estimates based on investment performance as it becomes available. An accurate fair-market value of your fund is available 10-15 business days following month-end and can be accessed here through the PDF version of your statement.

NEWS
Stay up to date with InFaith news and giving resources. Visit Donor News at InFaithFound.org for resources on how to engage your family in giving, how to make additional gifts and how to help ensure all have access to clean water through InFaith’s Creation Care initiative. If you have an endowment fund at InFaith, visit Endowment News.

FUND DASHBOARD
Please select a fund from the dropdown menu to begin. Please call us if you have questions at 800-365-4172. Quarterly market commentary can be found in My Documents 30 days after quarter end.

YOUR FUND
The Endowment Fund - Fund Id 451062
InFaith Community Foundation

FUND BALANCE
$980.53 (spendable)
$19,451.01 (market value)

STATEMENTS
Open Last Statement (In Acrobat)
See All Fund Activity and Statements

GO PAPERLESS
Check here – if you would like to be notified by email when your Statement is available online. You are currently set up to receive an email when your Statement is available online.

TOTAL CONTRIBUTIONS
Recent Contributions
No contributions have been made to this account in the past 90 days.

GRANT HISTORY
Recent Grants
Grant Actions

Click here to Recommend a New Grant
Below is an overview of your fund's activity. Daily fund values are based on end-of-day prior to selected date range, through the end-of-day of the date range. Fund values on your dashboard are estimates based on investment information as it becomes available.

An accurate fair-market value of your fund is available 10-15 business days following month-end and can be accessed here through the PDF version of your statement. Please call us if you have questions at 800.365.4172.

Contributions and grant distributions will be reflected on your fund summary once they have been processed. Click on any link in the Fund Activity Summary to view more information. NOTE: Date ranges will reflect all contributions/distributions since inception, however investment information is not available prior to 2014. Statements prior to 2014 are available upon request, please contact us.

FUND

Endowment Fund - Fund Id InFaith Community Foundation

SEARCH

Fund Activity Last 30 Days
Activity from:

Advanced Search

SUBMIT

GET STATEMENTS:

Click here to view Statements; by Month, Quarter or Year

Get Acrobat Reader

This section contains a Summary of Fund Activity for the time period selected above (30, 60, 90 days, etc.)

If you click on the Topics in blue text and underlined, you will get more detail below
INVESTMENT ALLOCATION

Your Fund's current Investment Allocation

Click here to change your Fund's current Investment Allocation if desired

INVESTMENT ALLOCATION INFORMATION
As a donor/fund advisor at InFaith Community Foundation, you have the flexibility to recommend how your charitable fund is invested. Your fund can be invested in InFaith's long-term portfolios, the Core Growth Portfolio, Mission Growth Portfolio, or WomenInvest InFaith Portfolio. Or, depending on your fund type, you can invest all or a portion of your fund's allocation to the Income Portfolio to reduce or eliminate your fund's investment in equities.

Click to change your Investment Allocation
Note: Allocations are typically adjusted within 2 weeks of your request.

To determine the right investment mix for your giving:

• What are your short-term vs. long-term grantmaking goals? Do you want your fund to grant for 10-20 years or more, and perhaps pass to future generations? Or do you plan to request larger grants within the next 2-10-year time horizon?
• Do your grantmaking plans allow for short-term fluctuations in investment values (and related investment risks) for potentially greater fund growth and charitable support over the long-term?
• Do you want all or a portion of your fund invested for both financial and mission/social return?

Investment Portfolio Options for your Fund

<table>
<thead>
<tr>
<th>Investment</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth Portfolio</td>
<td>investing for growth for maximum sustained support to charities far into the future</td>
</tr>
<tr>
<td>Mission Portfolio</td>
<td>Investing for growth for maximum sustained support to charities through investments that are aligned with mission and provide positive outcomes for our shared community</td>
</tr>
<tr>
<td>WomenInvest Portfolio</td>
<td>Investing for growth for maximum sustained support to charities by investing in companies that target the root causes of violence against women</td>
</tr>
<tr>
<td>Income Portfolio</td>
<td>Investing for stability and maximum grant support within a shorter time horizon</td>
</tr>
</tbody>
</table>
CHANGE INVESTMENT ALLOCATION

As a donor/fund advisor at InFaith Community Foundation, you have the flexibility to recommend how your charitable fund is invested. Your fund can be invested in InFaith's long-term portfolios, the Core Growth Portfolio, Mission Growth Portfolio, or WomenInvest InFaith Portfolio. Or, depending on your fund type, you can invest all or a portion of your fund's allocation to the Income Portfolio to reduce or eliminate your fund's investment in equities. To determine the right investment mix for your giving, consider your grantmaking goals:

- What are your short-term or long-term grantmaking goals? Do you want to grant for 10 to 20 years or more, or pass advisement to future generations? Do you grant larger amounts within the next 2 to 10 years?
- How would short-term fluctuations in investment values affect your grantmaking plans?
- Do you want all or a portion of your fund invested for financial and mission/social return?
CONTRIBUTION ACTIVITY

This page provides the history of contributions to a selected fund. Use Advanced Search to use a specific date range, search for specific keywords, or search by the Status of the contribution.

Clicking the Export Results to Excel link at the bottom of the page saves the list to an Excel spreadsheet. This export also provides more detail about each transaction.

**FUND**

The [Fund ID] Fund – Fund Id [Fund ID]

InFaith Community Foundation

**SEARCH**

Duration: Last 90 Days

**Advanced Search**

Click here to change the time range that activity is shown; Last 30, 60, 90 days, 6 months, or last year

**Details of Contributions to your Fund for the selected time period**

<table>
<thead>
<tr>
<th>Trans ID</th>
<th>Date</th>
<th>Party</th>
<th>Description</th>
<th>Status</th>
<th>Amount</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1707585</td>
<td>12/17/2018</td>
<td></td>
<td>American Mutual Fund CL F2</td>
<td>Received</td>
<td>$14,577.78</td>
<td>Mutual Fund</td>
</tr>
<tr>
<td>1707586</td>
<td>12/17/2018</td>
<td></td>
<td>T Rowe Price Growth Stock</td>
<td>Received</td>
<td>$9,586.50</td>
<td>Mutual Fund</td>
</tr>
</tbody>
</table>

**Export to Pdf**

**Export to Excel**

Clicking the 'Export to Pdf' or 'Export to Excel' links will cause the 'Details' information to be exported to a file that can be saved on your computer.
Your personalized list of organizations for grantmaking appears below. This list includes organizations you have selected online or made grants to through your Fund Dashboard.

- Add grantees to your list using “Search Available Grantees” button.
- To recommend a single grant, or a recurring grant, click "New Grant."
- To recommend grants to multiple organizations at once, click "Add to Cart." Then "Check Out" to confirm your grant recommendations. (Cart not available for recurring grants.)
- The minimum grant recommendation is $100. If you request a grant that will reduce your fund below $1,000, please consult with InFaith staff.

There are no items in the cart for the currently selected account.

Once you have added an Organization(s) that you want to grant to:

1. To make a single One-Time Grant - or - a Recurring Grant, click the "New Grant" button
2. If you will be making more than one Grant, use the "Grant Cart" functionality by clicking "Add to Cart"
ADD A GRANT TO YOUR GRANT CART

Organization: [Name]

Purpose:
- general support

Enter Instructions to the Grantee Organization regarding the purpose of the Grant

Amount:
- Enter the Grant Amount

Make Grant Anonymous

Special Note:
- If you have any Special Instructions to InFaith (not the Grantee Organization) enter it here

Once you have the Grant Details Complete:

1. Click "Save Changes" The Grant will be added to your "Cart" and you will be returned to the main Grant page.

2. Click "Save Changes & Go To Cart" when you are finished making Grants and ready to Check-Out

3. Click "Close" to return to the main Grant page without saving the item to your cart

CLOSE  SAVE CHANGES  SAVE CHANGES & GO TO CART
GRANT CART DETAILS

Your Grant Cart

Below is the list of all grant recommendations you have added to your "Grant Cart". You may edit or remove grants from this list, or go back to your "Grantee" list. When you are ready to submit your recommendations, please click "Checkout".

NOTE: Any time you make a change on this page, you must click the "Update" button to save your changes.

<table>
<thead>
<tr>
<th>Grantee Name</th>
<th>Amount</th>
<th>Grant Purpose</th>
<th>Anonymous</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>We Raise Foundation</td>
<td>$200.00</td>
<td>general support</td>
<td>N</td>
<td>Edit</td>
</tr>
<tr>
<td>Brother's Brother Foundation</td>
<td>$100.00</td>
<td>general support</td>
<td>N</td>
<td>Edit</td>
</tr>
<tr>
<td>Epiphany Lutheran Church</td>
<td>$500.00</td>
<td>general support</td>
<td>N</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Number of grants 3
Total Amount $850.00
Spendable Balance $132,793.53

Your Grant Cart

1. To Change the Amount, Purpose, etc. of a Grant in the cart, use the Action Buttons
2. Be Sure to click "Update Cart" if you make any changes!
3. To add another Grant not currently in the Cart, click "Add Another Charity"
4. When you are finished click "Check Out"
5. After clicking "Check Out" you will be shown a Summary page. Your Grants are not final until you click "Confirm and Submit"

<table>
<thead>
<tr>
<th>Grantee Name</th>
<th>Amount</th>
<th>Grant Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Redacted] Foundation</td>
<td>$200.00</td>
<td>general support</td>
</tr>
<tr>
<td>[Redacted] Foundation</td>
<td>$100.00</td>
<td>general support</td>
</tr>
<tr>
<td>[Redacted] Church</td>
<td>$500.00</td>
<td>general support</td>
</tr>
</tbody>
</table>

Number of grants 3
Total Amount $850.00
Spendable Balance $132,793.53

CANCEL  CONFIRM AND SUBMIT
ADD AN ORGANIZATION TO YOUR GRANTEE LIST

SEARCH GRANTEE ORGANIZATIONS
Use this page to search for a grantee to add to My Grantee List.

- For better results, try entering only the first few characters of the grantee name. (e.g., try "Salv" instead of "Salvation Army of St. Louis").
- If you do not find the grantees you want, try to refine your search by using the state filter or by entering less specific information.
- Leaving the search field blank will return all available charities in the selected state.
- You can also click here to suggest a new grantees to InFaith.

In the results list, click on the desired organization to add it to My Grantee List, or return to My Grantee List.

1. Type in the organization’s name or partial name
2. Click on the Organization Name in the search results to add them to your personal Grantee List

Refine your search by selecting the organization’s State
Click Submit to search, then review the search results (Step 2)
CREATE A SINGLE OR RECURRING GRANT

**GRANT ENTRY**

I would like to recommend a grant to:
Habitat for Humanity Greater San Francisco

Address: 648 Harrison St, #201, San Francisco, CA 94107

**Recommended Grant Amount:**
- As a Single Payment
- As a Recurring Payment

**Balance:** $6,863.69

**Amount:** $0.00

Frequency: Select how often you would like this Grant Payment to recur;
- Annually
- Bi-monthly
- Quarterly
- Semiannually

**# of Payments:** How many times should this grant recur

Start and End Dates: Select when you would like the first payment to start. The system will calculate the ‘End’ Date based on your selections above

**Other Grant Recommendation Details:**

- **Grant Purpose:** general support

15 characters used out of a maximum of 255 characters.

- I would like to learn more about how this grant was used by the charity. Please send me a report from this grant recipient one year following the date the grant was distributed.

(available for single grants of $25,000 or more).

**Special Instructions:**

If you have any Special Instructions to InFaith (not the Grantee Organization) enter it here

Enter the Grant Amount you would like to recommend. Be aware of the available Balance of your fund.

Select either a Single Grant Payment or a Recurring Grant Payment.

A: If you select Recurring you will have an additional section of choices.

Check this box if you want the Grant Payment to be anonymous.

Enter Instructions to the Grantee Organization regarding the purpose of the Grant.

For single grants of $25,000 or more, you can request a grant report from the charity by checking this box.
EDIT AN EXISTING RECURRING GRANT

GRANT HISTORY

Start by going to your Grant History Page

This page shows all grant activity (single grants and recurring grants) for the selected fund during a specified time period. Use Advanced Search to use a specific date range, search for specific keywords, or search by the Status of the grant recommendation.

The Type column indicates whether the grantee payment is a Single grant or a Recurring grant. If it is a recurring grant, a View Schedule link is also displayed. Clicking this link displays the payment schedule in detail.

Clicking the Export Results to Excel link at the bottom of the page saves the list to an Excel spreadsheet and provides more detail about each recommendation.

> View only Single Grants
> View your Recurring Grant Schedules
> View your Recurring Grant Schedules

RECURRING GRANT SCHEDULE(S)

This page displays any recurring grant schedules you have established at InFaith Community Foundation, as well as the status of each. Or you can recommend a new recurring grant. Clicking the Advanced Search link allows you to further narrow down the list. You can search by a specific range of dates, for specific keywords, or by the status of the grant recommendation.

Use the link in the Actions column for further information about a schedule. Clicking the Export Results to Excel link at the bottom of the page saves the list to an Excel spreadsheet and also provides more detail about each recommendation.

FUND

The ________ Fund – Fund Id ________

InFaith Community Foundation

RECURRING GRANTS SEARCH

Status: All Active - Advanced Search

RECURRING GRANTS DETAIL

<table>
<thead>
<tr>
<th>Grantee Name</th>
<th>Frequency</th>
<th>Payments To Date</th>
<th>Payments Left</th>
<th>Amount (per)</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Church</td>
<td>Monthly</td>
<td>6</td>
<td>6</td>
<td>$400.00</td>
<td>Entered</td>
<td>Details</td>
</tr>
</tbody>
</table>

Export to Pdf
Export to Excel

Click on the Grantee Name to view details about the Grantee Organization

Click on the 'Details' link to view the history of this recurring grant and to edit or cancel the recurring grant.
EDIT AN EXISTING RECURRING GRANT (CONTINUED)

RECURRING GRANT DETAILS

CHURCH

Schedule
From 9/6/2018 to 8/6/2019 Monthly for $400.00

Purpose
general support

Status
Entered

Use these buttons to make changes to the recurring grant, amount, instructions, etc. or to cancel the grant.
*Note* these changes will only affect the future, not any grants in the past.

Click "View" for more details about a single occurrence of the recurring grant.

If you want to extend the dates of your recurring grant, use the 'Cancel & Recreate' button. A new recurring grant will appear with all of the same details of the current one.
*Note* Once you click this button the existing recurring grant WILL be canceled.

PAYMENTS TO DATE

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Amount</th>
<th>Created</th>
<th>Cleared</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1567534</td>
<td>Posted</td>
<td>$400.00</td>
<td>9/6/2018</td>
<td>9/6/2018</td>
<td>View</td>
</tr>
<tr>
<td>1600383</td>
<td>Posted</td>
<td>$400.00</td>
<td>9/22/2018</td>
<td>10/6/2018</td>
<td>View</td>
</tr>
<tr>
<td>1633026</td>
<td>Posted</td>
<td>$400.00</td>
<td>10/23/2018</td>
<td>11/6/2018</td>
<td>View</td>
</tr>
<tr>
<td>1665466</td>
<td>Posted</td>
<td>$400.00</td>
<td>11/22/2018</td>
<td>12/6/2018</td>
<td>View</td>
</tr>
<tr>
<td>1716487</td>
<td>Posted</td>
<td>$400.00</td>
<td>12/23/2018</td>
<td>1/6/2019</td>
<td>View</td>
</tr>
<tr>
<td>1746101</td>
<td>Posted</td>
<td>$400.00</td>
<td>1/23/2019</td>
<td>2/6/2019</td>
<td>View</td>
</tr>
</tbody>
</table>
This page shows all grant activity (single grants and recurring grants) for the selected fund during a specified time period. Use Advanced Search to use a specific date range, search for specific keywords, or search by the Status of the grant recommendation.

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Clicking the Export Results to Excel link at the bottom of the page saves the list to an Excel spreadsheet and provides more detail about each recommendation.

> View only Single Grants
> View your Recurring Grant Schedules

Click here to select the Fund that you want to see Grant History for

Click here to change the time range that activity is shown; Last 30, 60, 90 days, 6 months, or last year

Click 'Advanced Search' for a precise date range

Clicking the 'Export to Pdf' or 'Export to Excel' links will cause the 'Details' information to be exported to a file that can be saved on your computer.
Below is a list of all users that are related in some way to your fund(s). Use the dropdown to view other funds if you have more than one with the Foundation.

Donor/Fund Advisors can request the addition/removal of online fund access by signing and submitting a request form. ([Download form](#)) if you need to make any other changes to this information, please [contact us](#).

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Adviser-requested access</td>
<td>Full Access</td>
</tr>
<tr>
<td></td>
<td>Donor/Adviser-Deceased</td>
<td>No Access</td>
</tr>
<tr>
<td></td>
<td>Primary Financial Rep</td>
<td>Read Only</td>
</tr>
</tbody>
</table>
Here you will find other documents related to your fund:
- Your original Fund Agreement
- Quarterly InFaith Investment Reports
- and other fund maintenance forms

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**GENERAL DOCUMENTS**

<table>
<thead>
<tr>
<th>TITLE</th>
<th>SIZE</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using DonorView</td>
<td>1.70 MB</td>
<td>Download</td>
</tr>
<tr>
<td>Most Recent Quarterly Investment Report</td>
<td>Unknown</td>
<td>Download</td>
</tr>
<tr>
<td>InFaith Portfolio Allocation</td>
<td>728.99 KB</td>
<td>Download</td>
</tr>
</tbody>
</table>

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**FOR INDIVIDUALS**

<table>
<thead>
<tr>
<th>TITLE</th>
<th>SIZE</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3 2016 Update - Donor Advised Dynamic Funds</td>
<td>42.93 KB</td>
<td>Download</td>
</tr>
<tr>
<td>Your Fund - Change Authorized Access</td>
<td>629.63 KB</td>
<td>Download</td>
</tr>
<tr>
<td>InFaith Charity Change Form</td>
<td>748.63 KB</td>
<td>Download</td>
</tr>
</tbody>
</table>

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**FOR ORGANIZATIONS**

<table>
<thead>
<tr>
<th>TITLE</th>
<th>SIZE</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3 2016 Update - Organizational Endowments</td>
<td>34.99 KB</td>
<td>Download</td>
</tr>
<tr>
<td>Fund Advisor Change Form</td>
<td>636.15 KB</td>
<td>Download</td>
</tr>
<tr>
<td>Add/Remove Online Access Request</td>
<td>34.76 KB</td>
<td>Download</td>
</tr>
</tbody>
</table>
This page contains information pertaining to you, the person logged into FundView. You can make changes to your Address, Phone, Email, Username, Password or your Secret Question(s).

Click the 'Add' button to add a new address, then click 'Save'.

Review your addresses and click the 'Make Mailing' button for the address where you wish to receive any correspondence from InFaith.

Shown below is the information InFaith Community Foundation has on file. When making changes to your address, phone, email, password or secret question, please click "Save" before moving on to another tab. To make changes to any other information please call 800-365-4172 or email contact@InFaithFound.org.