YOUR FUND DASHBOARD | GUIDE AND REFERENCE

1. Log in at:  http://www.InFaithFound.org/fundlogin
2. First Time Login Steps
3. Trusts & Gift Annuities Fund Overview
4. Contribution History
5. Distribution History
6. Fund Activity
7. Succession
8. Fund Relationships
9. Fund Documents
10. My Profile

Questions? Call InFaith at (800) 365-4172
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.

**Password Requirements:**
- Between 6-10 characters
- Includes at least 2 letters
- Includes at least 2 numbers
FIRST-TIME LOG IN INSTRUCTIONS

RESET PASSWORD
InFaith user ID
Primary telephone number
Country
Select an authentication method
○ Text Message
○ Call
SEND VERIFICATION CODE
CANCEL

You will receive your username in a letter or email from InFaith
Login to your Fund Dashboard
Username: XXXXXXX

Enter Username

Enter a phone number that you can receive a verification code

Select one of these options, then click to receive your authentication code

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
TRUSTS & GIFT ANNUITIES FUND OVERVIEW

ACCOUNT SELECTOR
The Glen and Alice Allison Charitable Remainder Unitrust Acct. ID 153069

ACCOUNT BALANCE
$111,846.35 (market value)

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

TOTAL CONTRIBUTIONS
$99,545.52 (as of 4/30/2018)
No additions have been made to this account in the past 30 day(s).

RECENT/UPCOMING DISTRIBUTIONS
No records found
See All Distributions

Click to switch between different Trusts or Gift Annuities.

Click 'Trusts & Gift Annuities' then one of the sub-menus to navigate to other pages.

This page contains a summary of Account Balance, the last Fund Statement, Contributions and Distributions.

Use the links to the left or the menu items above to view pages with more detail on any of these topics.
CONTRIBUTION HISTORY

ACCOUNT SELECTOR

The Charitable Remainder Unitrust Acct. ID

SEARCH

Range

Advanced Search

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.

CONTRIBUTION HISTORY

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>Status</th>
<th>Account</th>
<th>Organization</th>
<th>Type</th>
<th>Payment Type</th>
<th>Payment Amount</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>673302</td>
<td>Received</td>
<td>The Charitable Remainder Unitrust</td>
<td>Allison, Glen J.</td>
<td>security contribution</td>
<td>$28,132.00</td>
<td>5/25/2010</td>
<td></td>
</tr>
<tr>
<td>673301</td>
<td>Received</td>
<td>The Charitable Remainder Unitrust</td>
<td>Allison, Glen J.</td>
<td>security contribution</td>
<td>$71,392.80</td>
<td>5/25/2010</td>
<td></td>
</tr>
</tbody>
</table>

EXPORTLISTER

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.

Details of Contributions to your Fund for the selected time period.
### DISTRIBUTION HISTORY

#### ACCOUNT SELECTOR

- **The Charitable Remainder Unitrust Acct. ID**

#### SEARCH

- **Range**
  - Last 30 Days

- **Advanced Search**

#### DISTRIBUTION HISTORY

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>Status</th>
<th>Account</th>
<th>Type</th>
<th>Description</th>
<th>Payment Type</th>
<th>Payment Amount</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>877821</td>
<td>Posted</td>
<td>The Charitable Remainder Unitrust</td>
<td>CRUT Payment</td>
<td>Cash</td>
<td>EFT</td>
<td>$803.05</td>
<td>3/28/2017</td>
</tr>
<tr>
<td>877820</td>
<td>Posted</td>
<td>The Charitable Remainder Unitrust</td>
<td>CRUT Payment</td>
<td>Cash</td>
<td>EFT</td>
<td>$803.05</td>
<td>3/28/2017</td>
</tr>
</tbody>
</table>

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.

Details of Distributions from your Fund for the selected time period.
This page shows the Donor Advised Fund that will receive the remainder of the Trust or Gift Annuity once the term of the Trust or Gift Annuity is complete.

Contact InFaith by phone (800) 365-4172 to make changes to existing relationships.

The individuals who currently have a relationship to this Fund and their Access Level:
Here you will find other documents related to your fund;
Your original Fund Agreement and Tax Packet

ACCOUNT

The Charitable Remainder Unitrust Acct. ID

FUND DOCUMENTS

File Name
Tax Packet.pdf
CRT_2016.pdf

*Note*
Monthly and Quarterly Statements are found on the 'Fund Activity' page
This page contains information pertaining to you, the person logged into DonorView. You can make changes to your address, phone, email, password or your Secret Question(s).

Please use the 'Add' button to add your new address, then click 'Save'.

Please don't use 'delete' as it is important for InFaith to retain a record of prior addresses.