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Logging in
Please visit https://churchfdn.spectrumportal.net/ to access the Presbyterian Foundation’s new Donor Advised Fund online portal, the Spectrum Web Portal. Your username for the new portal will be the email address that we have on file for you. Please locate the temporary password provided to you in your Portal Invitation email message.

Also located on the login page, you will find options for sending yourself a password hint via email (set up after logging in for the first time), as well as an option to reset your password if it has been forgotten.
Home Page
You will be greeted with a welcome message, and your account number and name will be shown. If you have more than one fund, there will be a dropdown box on each page in the site which lists your Donor Advised Funds, and you may choose a fund to view and interact with from this dropdown box. On the home screen, you will find the information structured in a tile format, and it will display your current fund balance, summaries of your prior contributions and grants, a summary of upcoming scheduled grants and grants currently in process, as well as our contact information should you need any assistance. Each tile contains a link (in blue text) that you may click to access further details.
Site Menu

My Account

At the top of the screen, you will find your new menu options. To change your personal information, such as your name, contact information, or password, choose My Account. Upon logging in for the first time, please visit the My Account page to change the temporary password we provided you. The Change Password page will also allow you to create a Password Hint. This Hint will be sent to you via email if you choose to use the “Send password hint” link found on the login page.

Fund Advisor

Hover your cursor over the Fund Advisor menu, and your options will be displayed. Here you may click on any option to navigate to the various pages of the portal, including your Home page, forms for making a contribution into your fund or recommending a grant be made out of your fund, your grant and contribution histories, and information about the investment allocations of your fund. **Note:** For Financial Advisors, such as accountants, investment managers, etc., this menu will be labeled Financial Advisor and will contain only those pages for which you are authorized.
**Recommend a grant**

To recommend a grant, you may click on either the Make a Grant Recommendation link on the Grant Summary tile of your home page, or you may click on the Recommend Grant link in your Fund Advisor menu.

**Note:** Financial Advisors such as accountants, investment managers, etc. who are assigned fund access by donors who establish a Donor Advised Fund with the Foundation have rights to view prior grants only and may not submit recommendations for new grants out of the fund.

**Fund Details**

Your fund name and balance will be listed on the Fund Details tab of the Grant Recommendation form. If you have multiple funds, you may click edit on the Fund Details to switch between funds. When finished, click Next Tab.

![Grant Recommendation Form](image)

Please fill out the following tabs. On the Grant Information tab, if you choose the donor anonymous check box, your name will be replaced with "anonymous donor" for any correspondence used by the foundation. If you choose the "anonymous fund" check box, any reference to your fund in any correspondence will be replaced with "an anonymous fund".

**Note:** At any time prior to submitting your request, you may delete or save the request to return to it later. Saved recommendations can be found in the Fund Advisor menu under Saved Grant Recommendations. Please note, saved recommendations have not been submitted to the Foundation for processing. To submit your recommendation, please complete all tabs of the form, and click Submit on the final Submission tab.
**Recipient**

On the Recipient tab of the form, click +Add to select a grant recipient charity. You will be given the option to search from charities you have granted to previously, all charities who have received grants from any of our funds, or all charities registered with the IRS. You may also choose to enter a new grant recipient, such as your church.

If choosing one of your prior grant recipients, you will be redirected to your Grant History. Click the ellipses (…) next to a prior grant to add the prior recipient to your new recommendation.
When searching either our full database of recipients or the IRS database of charities, you’ll be prompted to enter the name or tax ID of the charity you wish to find. You may select the down arrow next to a charity name to view details and click the Select button to add the organization to your grant recommendation.

When choosing to enter a new recipient not found in our database or the IRS database, you will be prompted to provide the name and address of the organization. You may provide the charity’s tax ID if you have it, but this field is not required.

When finished, click Next Tab.
Grant Information
Click Edit to enter the specifics of your grant, including the amount, purpose (how you wish the money to be used by the charity), and any anonymity preferences. You may write a note directly to our Foundation staff if there is anything you wish to tell us, such as a name of someone you wish to honor or memorialize with this grant or some other instructions you may have. You may submit your grant recommendation as a one-time payment, or you may mark the request as a recurring payment and will be given the option to choose a frequency (monthly, quarterly, semi-annually, or annually) and start date. You may optionally provide an end date for your grant. If no end date is submitted, the grant will continue to be paid on the prescribed frequency until the balance of your account has been exhausted or until you cancel the request. Cancellations can be made by going to Saved Grant Recommendations in the Fund Advisor menu. Locate the grant you wish to cancel, click the ellipses (...) button next to the grant, and select Cancel.

When finished completing your grant details, click Save and Next Tab.

Note: The Grant Purpose field will default to “Unrestricted use.” If you have no specific way that you wish the charity to use this grant money, you may leave this in the Grant Purpose field. If you have specific restrictions on the usage of the money, you may overwrite “Unrestricted use” with your own designation.
Acknowledgement
The default name and address for acknowledgement of grants from your fund will be listed here. These will be provided in a letter to the recipient charity along with a check for the amount of your grant so that the charity is made aware of who recommended the grant and may send a thank you note. You may click Edit to change the name and address provided to the charity. When finished, click Next Tab.

Note: If you selected “Anonymous Fund Advisor” on the Grant Information tab, this information will not be provided to the charity.

Submission
Before submitting your grant recommendation, please read the Legal Statement regarding grants from your fund. If you agree to these terms, please check the I Agree box. You may click on any of the tabs of the recommendation form to review or edit the information. The signature field will be populated with a signature of your name. If you are satisfied with your request, click the Submit button. You will receive an email confirmation of your submission, and your grant recommendation will be transmitted to our staff for processing.
**Make a contribution**

To make a contribution into your fund, click the Make a Contribution link in your Fund Advisor menu. You may make your gift electronically via credit/debit card or a direct debit from your bank account by completing the online form found here. Please note, gift processing times will apply. It can take up to one day for new contributions to be listed on this site. From the time of online submission, contributions may take up to 14 business days to be deposited to the fund. Processing fees apply for online contributions. Contributions made using a credit/debit card incur a fee of 2.598% + $0.26 per transaction. Contributions made using a direct debit from a checking/savings account incur a fee of $0.75 per transaction. Donors are given charitable gift acknowledgement for the full contribution amount (can be claimed as a charitable gift deduction for taxes), but the contribution amount, less the transaction fee, will be deposited to the receiving fund. If you will be making your gift offline (check, stocks, mutual funds, etc.), please visit [https://www.presbyterianfoundation.org/make-a-contribution/](https://www.presbyterianfoundation.org/make-a-contribution/) for further information about submitting your gift and how to notify us to be expecting it.

**New feature alert!** You may now establish a recurring gift! Choose your preferred gift frequency, and your gift will be automatically debited from your card or bank with no need for you to log in each time to initiate a payment. To cancel a recurring gift made through the online portal, please contact us at [OnlineServices@presbyterianfoundation.org](mailto:OnlineServices@presbyterianfoundation.org).

**Note:** Financial Advisors such as accountants, investment managers, etc. who are assigned fund access by donors who establish a Donor Advised Fund with the Foundation have rights to view prior contributions only.

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**Make a Contribution**

From this page you can make an electronic contribution to one of your funds. Please note, gift processing times will apply. It can take up to one day for new contributions to be listed on this site.

To make an offline contribution via check, securities, or other assets, please visit [https://www.presbyterianfoundation.org/make-a-contribution/](https://www.presbyterianfoundation.org/make-a-contribution/) for further instructions.

**Donation Information**

- **Fund:** Your account number & name here
  - *Indicates my fund.
- **Amount:**
- **Anonymous:** (make donation anonymously)
- **Comments:**

**Payment Method**

- Credit/Debit Card
- Direct Debit (ACH)

**Payment Frequency**

- One Time Gift
- Weekly
- Monthly
- Quarterly
- Annually

**Make a Donation**
After choosing your donation amount, payment method, and donation frequency, click Make a Donation. Follow the prompts to enter your corresponding card or bank information, and click Finish and pay. You will receive an email confirmation of your submission, and your contribution will be transmitted to our staff for processing.
Transaction Histories

Within the online portal, you can review gifts made to your fund, as well as prior grants paid from your fund. These pages are called your Contribution History and your Grant History. They may be accessed from the links found in your Fund Advisor menu or from the links located in the Contribution and Grant History graph tiles on your home page.

On each history page, the transactions are arranged in a list format. At the top of the list, you will find a search bar for looking for a specific transaction, as well as a funnel-shaped button that will allow you to apply filters to the list of transactions. You may also customize the columns shown in your list using the book-shaped button, as well as Export the list to a spreadsheet. You may also click on any column header to sort the list by that column.
**Contribution History**

On the Contribution History page, you will have access to see all gifts made to your fund since its opening, including gifts made by other donors. If an individual made their gift anonymously, the donor name will be listed as “Anonymous.” You may toggle between seeing all gifts to your fund and only the gifts you have made by switching the Gift Source field above the Contribution list from “All” to “Mine.”

<table>
<thead>
<tr>
<th>Fund</th>
<th>Gift Source</th>
<th>3/19/2020</th>
<th>$112.99</th>
<th>Cash</th>
<th>Cash</th>
<th>Your Name Here</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mine</td>
<td>12/20/2019</td>
<td>$510.00</td>
<td>Cash</td>
<td>Credit Card</td>
<td>Your Name Here</td>
</tr>
<tr>
<td></td>
<td></td>
<td>11/27/2017</td>
<td>$10,452.69</td>
<td>Sold Stock</td>
<td>Other</td>
<td>Your Name Here</td>
</tr>
<tr>
<td></td>
<td></td>
<td>11/30/2017</td>
<td>$1,000.09</td>
<td>Cash</td>
<td>Personal Check</td>
<td>Other Donor’s Name Here</td>
</tr>
</tbody>
</table>

**Grant History**

On the Grant History page, you will have access to see all grants made from 2014 to present. For data conversion purposes, older grants will not be visible in the new portal. Should you need information about historical grants, please contact us at OnlineServices@presbyterianfoundation.org. From the Grant History list, you may click on the ellipses (...) beside any grant to copy the grant information into a new grant recommendation. Once on the grant recommendation form, you will have the ability to edit the information from the prior grant in case you wish to change the amount or the restrictions on the usage of the money.

<table>
<thead>
<tr>
<th>Fund</th>
<th>11/19/2019</th>
<th>$5,000.00</th>
<th>Presbyterian Night Shelter</th>
<th>FORT WORTH, TX, 76113</th>
<th>FOR THE CAMPAIGN FOR CAMPUS RENEWAL AT THE… See more</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11/19/2019</td>
<td>$7,600.00</td>
<td>National Ghost Ranch Foundation Inc.</td>
<td>ABINGDON, VA, 24210</td>
<td>NO RESTRICTIONS</td>
</tr>
<tr>
<td></td>
<td>11/19/2019</td>
<td>$5,000.00</td>
<td>Presbyterian Mission Agency (Weather Resilience Processing)</td>
<td>PITTSBURGH, PA, 15204</td>
<td>PRESBYTERIAN DISASTER ASSISTANCE TO BE USED IN THE… See more</td>
</tr>
<tr>
<td></td>
<td>7/24/2019</td>
<td>$250.00</td>
<td>First Presbyterian Church</td>
<td>SOME CITY, IN, 12345</td>
<td>THIS DONATION IS MADE TO THE GLORY OF GOD AND IN… See more</td>
</tr>
</tbody>
</table>
Investments

Portfolio Snapshot

Based on your prior requests, your fund may be invested in one or more mutual funds, as well as a money market vehicle. You may view the current holdings of your fund via the Portfolio Snapshot report. A link to this report can be found in your Fund Advisor menu. Your Portfolio Snapshot Report will display a table of the current holdings in your fund, along with a pie chart to visually depict the percentage of each asset held.

Note: All holdings represented in the Portfolio Snapshot are as of the close of business on the previous business day.

<table>
<thead>
<tr>
<th>%</th>
<th>Product Name/Investment</th>
<th>Ticker</th>
<th>Units</th>
<th>Price</th>
<th>Price Date</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FIDELITY INST MONEY MARKET</td>
<td>FROXX</td>
<td>452.00</td>
<td>$1.00</td>
<td>10/31/2016</td>
<td>$452.93</td>
</tr>
<tr>
<td>99</td>
<td>VANGUARD BALANCED INDEX FUND ADMIRAL</td>
<td>VBIAX</td>
<td>822.00</td>
<td>$39.00</td>
<td>07/08/2020</td>
<td>$32,678.27</td>
</tr>
</tbody>
</table>

Grand Total $33,131.20
Change Investment Allocations
You may wish to recommend changes to your current investment allocations. To make a recommendation, click on Change Investment Allocations in your Fund Advisor menu. On this page, you will see your current fund balance and current allocations. To recommend a change, click on +Edit Investments.

You may change your current Investment Strategy by clicking the green button and making your selection. If you have chosen a Custom Strategy, you may click +Add Investment to choose an asset and enter your preferred percentage allocation. Your recommended allocations will be listed in the Pending % column. Click Save, and your recommendation will be transmitted to our staff for processing.