

Spectrum Web Portal Help Guide

Presbyterian Foundation Donor Advised Fund Online Portal

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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.

Presbyterian FOUNDATION 800-858-6127
Home Contact Us

Sign In

User ID (Email address)

Password

Keep me signed in

Sign In

[Register / Send password hint / Reset password](#)


[Privacy Policy](#) [FAQs](#) [Newsletters](#) [PC\(USA\)](#) [f](#) [t](#) [in](#)

Presbyterian Foundation
200 E 12th Street
Jeffersonville, IN 47130
800-858-6127

100%

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.





**Presbyterian
FOUNDATION**

800-858-6127

[Home](#) [Contact Us](#)

[FUND ADVISOR](#) [MY ACCOUNT](#) [SIGN OUT](#)





Welcome!

Fund Your account number & name will be listed here

* Indicates you are an advisor for this fund.

▼ Expand All
▲ Collapse All

Fund Summary ▲ ☰

[View Fund Summary Screen](#)

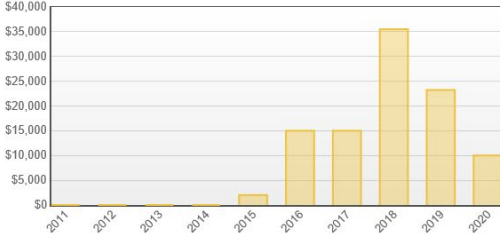
Current Net Assets	\$33,131.20
Current Available Balance	\$33,131.20

Contacts ▲ ☰

If you have questions or need help with your fund please contact our Online Services team toll free at (844) 299-4011 or by email at OnlineServices@presbyterianfoundation.org.

Grant History ▲ ☰

[View Grant History Screen](#)



Grant Summary ▲ ☰

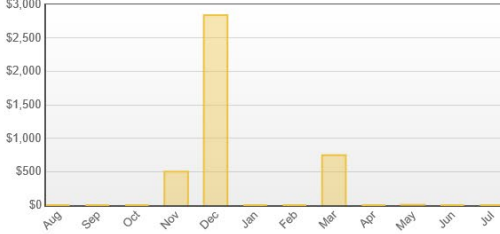
[Make a Grant Recommendation](#)
[Grant Recommendations](#)
[Grant History](#)

All numbers are for the selected fund.

Submitted Recommendations	0
Grants Pending Approval	0
Grants In Processing	0
Grant History	
Total Payments Scheduled	\$0.00
Payments Paid Last Month	\$0.00
Payments Due This Month	\$0.00

Contribution History ▲ ☰

[View Contribution History Screen](#)



[Privacy Policy](#) [FAQs](#) [Newsletters](#) [PC\(USA\)](#)

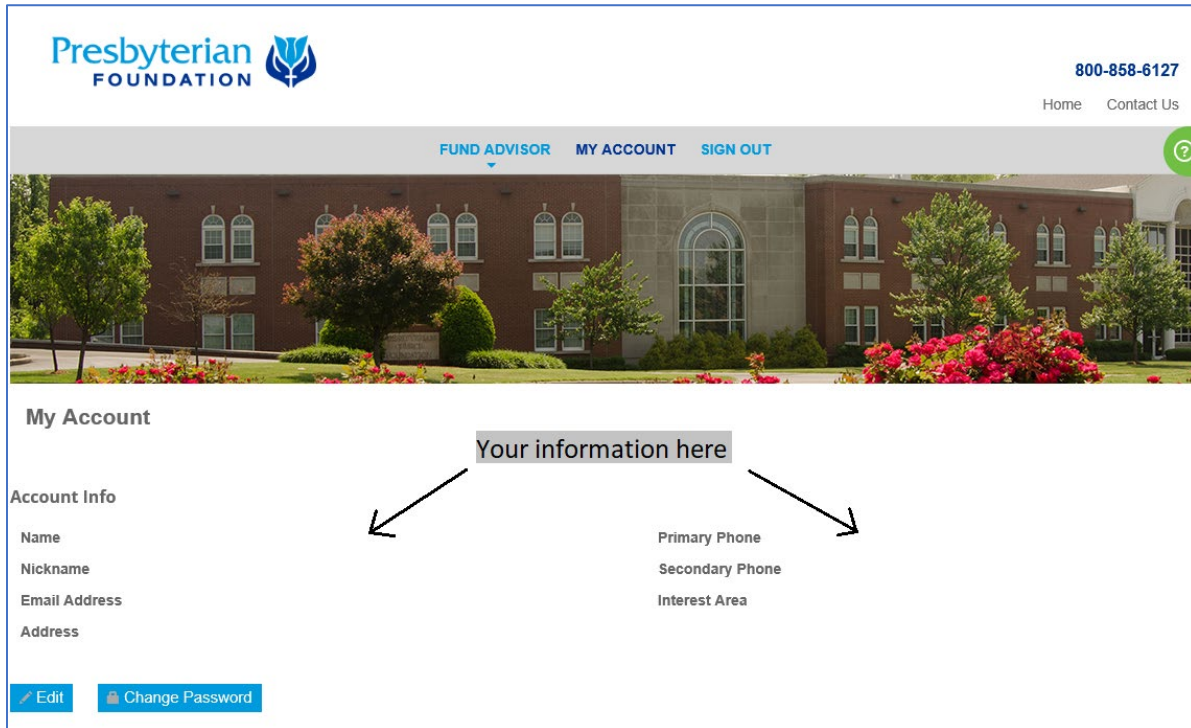
[f](#) [t](#) [in](#)

Presbyterian Foundation
 200 E. 12th Street
 Jeffersonville, IN 47130
 800-858-6127

Site Menu

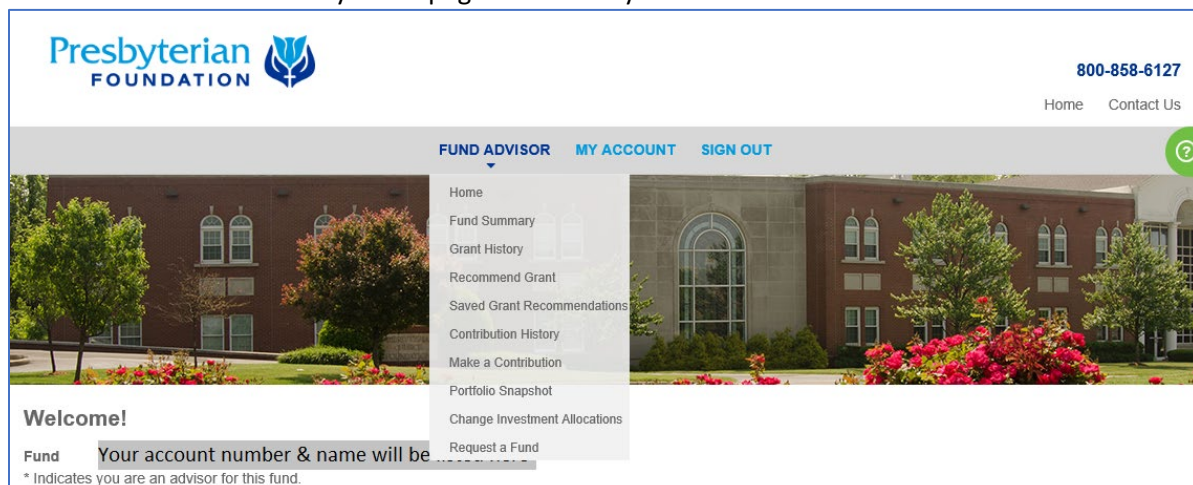
My Account

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


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".

Donor Name	Your information here	Recipient
Donor Email		Amount
Status		

 Delete  Save

Please select each tab to view/edit your Grant Request details.

- Fund Details**
- Recipient
- Grant Information
- Acknowledgement
- Submission

 Edit

Source Fund *
 Your fund name & balance here

Current Available Balance

Next Tab

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.

Recipient Options ×

- Search all recipients in the database
- Search for recipients in past grant requests
- Search for recipients in the IRS List
- Enter a new recipient

[Continue](#) [Cancel](#)

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.

Grant History

Click on column headings to sort grants, or click on the ellipses for a grant to view grant details or to use a grant as the basis for a new request.

Fund Your account number and name here
* Indicates you are an advisor for this fund.

[← Return to grant recommendation](#)

Find in this list Rec Count: 20 Rec Limit: Items Per Page:

	Status	Date Paid	Amount	Anonymous Fund	Anonymous Advisor	Recipient	City/State	Designation
<input type="button" value="⋮"/>	PROCESSED	2/28/2020	\$7,000.00			University Presbyterian Church	EL PASO, TX, 79912	SUPPORT FOR THE See more
<input type="button" value="⋮"/>			\$1,000.00			University Presbyterian Church	EL PASO, TX, 79912	SUPPORT OF See more

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.

The image shows a 'Recipient Search' dialog box with a search bar containing 'habitat for humanity'. Below the search bar are three search results, each with a green 'Select' button and a dropdown arrow. The first result is 'Appalachia Habitat for Humanity', the second is 'Asheville Area Habitat for Humanity', and the third is 'Habitat for Humanity International'. Below the third result, there is a table with contact information:

Address	121 Habitat Street Americus, GA 31709-3498
Contact Info	Phone: (229) 924-6935 Phone: www.habitat.org

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.

The image shows a 'Recipient Details' form with the following fields:

- Recipient Name * (text input)
- Address Block * (text input)
- City * (text input)
- State * (dropdown menu)
- Zip * (text input)
- Contact Name (text input)
- Contact Title (dropdown menu)
- Phone Number (text input)
- Email Address (text input)
- EIN (SSN or Tax ID) (text input, containing '12-3456789')

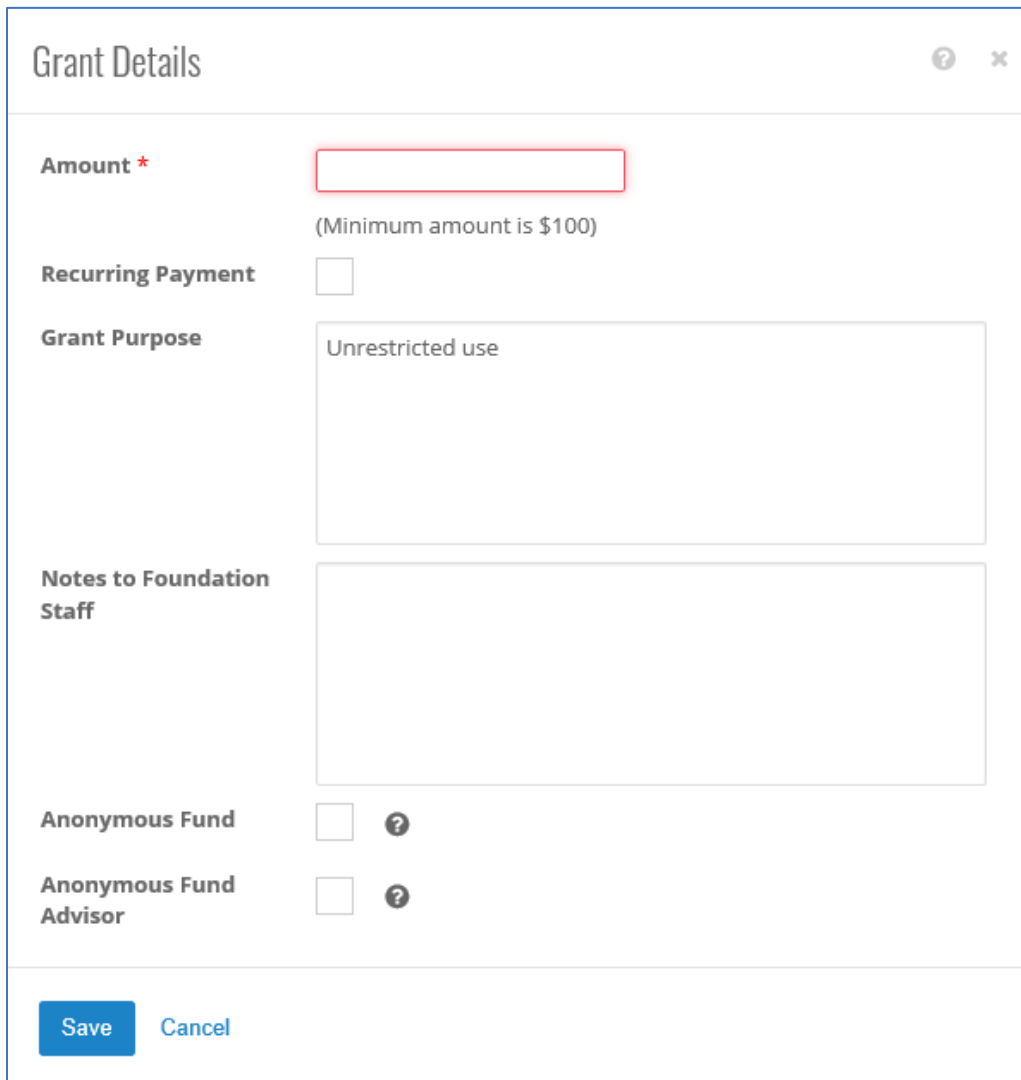
At the bottom of the form are 'Save' and 'Cancel' buttons.

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.



The screenshot shows a form titled "Grant Details" with a question mark icon and a close button in the top right corner. The form contains the following fields and options:

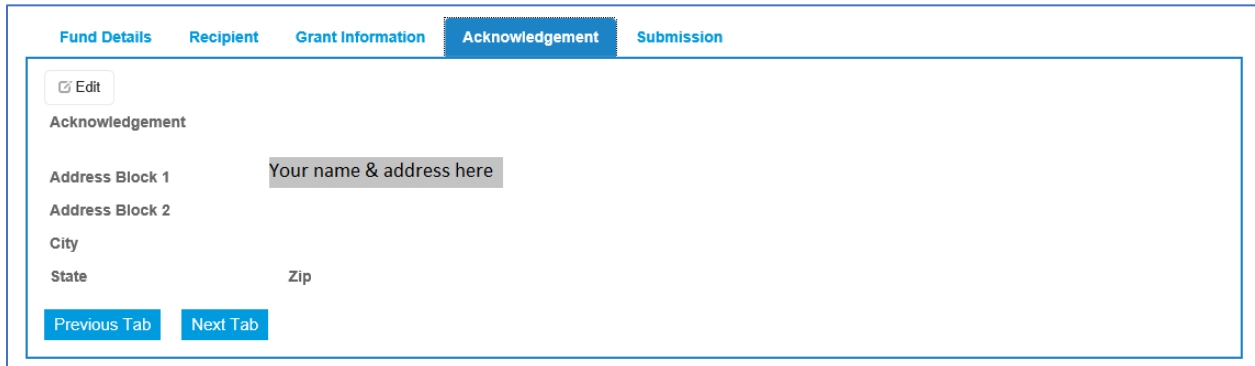
- Amount ***: A text input field with a red border. Below it, the text "(Minimum amount is \$100)" is displayed.
- Recurring Payment**: A checkbox that is currently unchecked.
- Grant Purpose**: A text area containing the text "Unrestricted use".
- Notes to Foundation Staff**: A larger text area that is currently empty.
- Anonymous Fund**: A checkbox that is unchecked, followed by a question mark icon.
- Anonymous Fund Advisor**: A checkbox that is unchecked, followed by a question mark icon.

At the bottom of the form, there are two buttons: "Save" (in blue) and "Cancel" (in grey).

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.

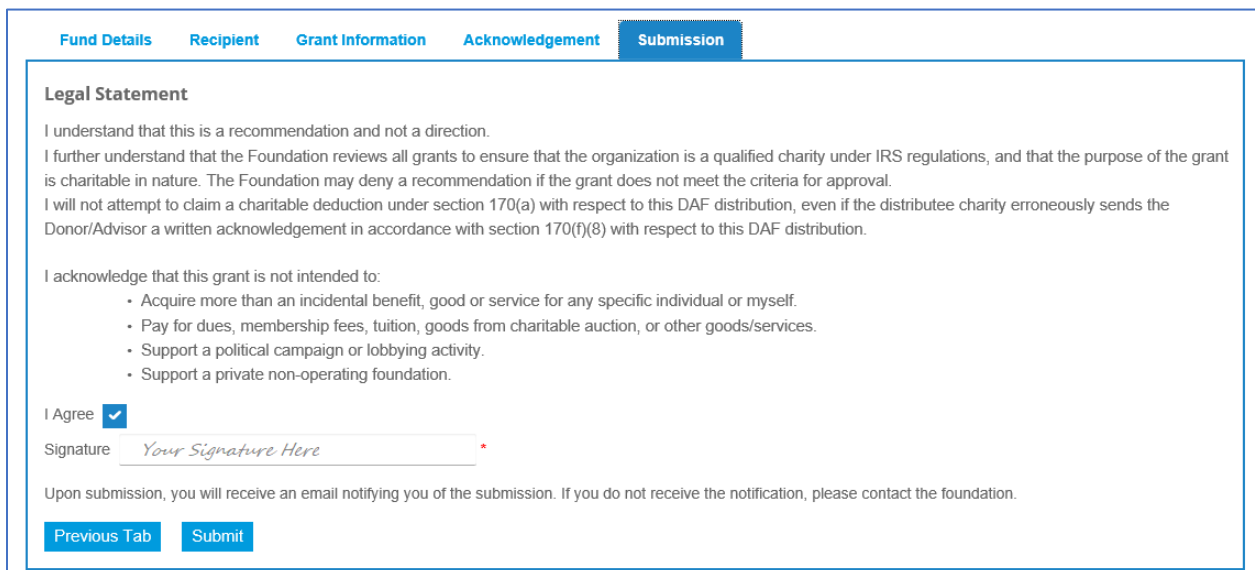


The screenshot shows a navigation bar with five tabs: Fund Details, Recipient, Grant Information, Acknowledgement (selected), and Submission. Below the navigation bar is a form titled "Acknowledgement". At the top left of the form is a button with a checkmark and the text "Edit". The form contains several input fields: "Address Block 1" with a placeholder "Your name & address here", "Address Block 2", "City", "State", and "Zip". At the bottom of the form are two buttons: "Previous Tab" and "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.



The screenshot shows a navigation bar with five tabs: Fund Details, Recipient, Grant Information, Acknowledgement, and Submission (selected). Below the navigation bar is a form titled "Legal Statement". The form contains the following text: "I understand that this is a recommendation and not a direction.", "I further understand that the Foundation reviews all grants to ensure that the organization is a qualified charity under IRS regulations, and that the purpose of the grant is charitable in nature. The Foundation may deny a recommendation if the grant does not meet the criteria for approval.", "I will not attempt to claim a charitable deduction under section 170(a) with respect to this DAF distribution, even if the distributee charity erroneously sends the Donor/Advisor a written acknowledgement in accordance with section 170(f)(8) with respect to this DAF distribution.", "I acknowledge that this grant is not intended to:" followed by a bulleted list: "Acquire more than an incidental benefit, good or service for any specific individual or myself.", "Pay for dues, membership fees, tuition, goods from charitable auction, or other goods/services.", "Support a political campaign or lobbying activity.", "Support a private non-operating foundation.", Below the list is a checkbox labeled "I Agree" which is checked. Underneath is a signature field with the placeholder "Your Signature Here" and a red asterisk. At the bottom of the form is a line of text: "Upon submission, you will receive an email notifying you of the submission. If you do not receive the notification, please contact the foundation." At the very bottom are two buttons: "Previous Tab" and "Submit".

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/> 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.

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.

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/> for further instructions.

Donation Information

Fund * ▼
*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.

PAYMENT METHOD
Your account number & name
donation

Pay by card

Or by wallet

VISA | MASTERCARD | AMEX

\$100

CONTACT & BILLING
Your account number & name
donation

←

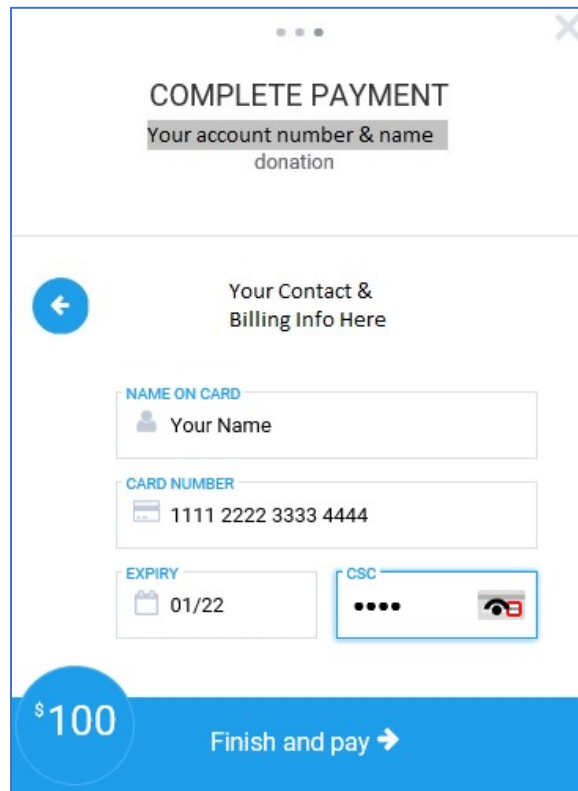
FIRST NAME: Your
LAST NAME: Name

EMAIL ADDRESS: YourName@YourEmail.com

COUNTRY: United States

ADDRESS: 123 Your Street
CITY: Your City
STATE: Indiana
ZIP: 12345

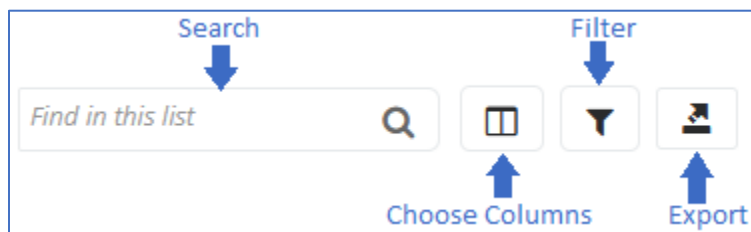
\$100 Continue to payment →



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."

Contribution History

To view contributions you have made, set the Gift Source to "Mine." To view contributions made by all donors to a given fund, set the Source to "All."

Fund Your account number & name here

* Indicates you are an advisor for this fund.

Gift Source Mine All

Find in this list Rec Count: 128 Rec Limit: Items Per Page:

Open	Date	Total Amount	Type	Payment Method	Donor Name
<input type="button" value="Open"/>	3/19/2020	\$112.99	Cash	Cash	Your Name Here
<input type="button" value="Open"/>	12/29/2019	\$510.00	Cash	Credit Card	Your Name Here
<input type="button" value="Open"/>	11/27/2017	\$10,452.60	Sold Stock	Other	Your Name Here
<input type="button" value="Open"/>	11/3/2017	\$1,000.00	Cash	Personal Check	Other Donor's Name Here

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.

Grant History

Click on column headings to sort grants, or click on the ellipses for a grant to view grant details or to use a grant as the basis for a new request.

Fund Your account number & name here

* Indicates you are an advisor for this fund.

Find in this list Rec Count: 20 Rec Limit: Items Per Page:

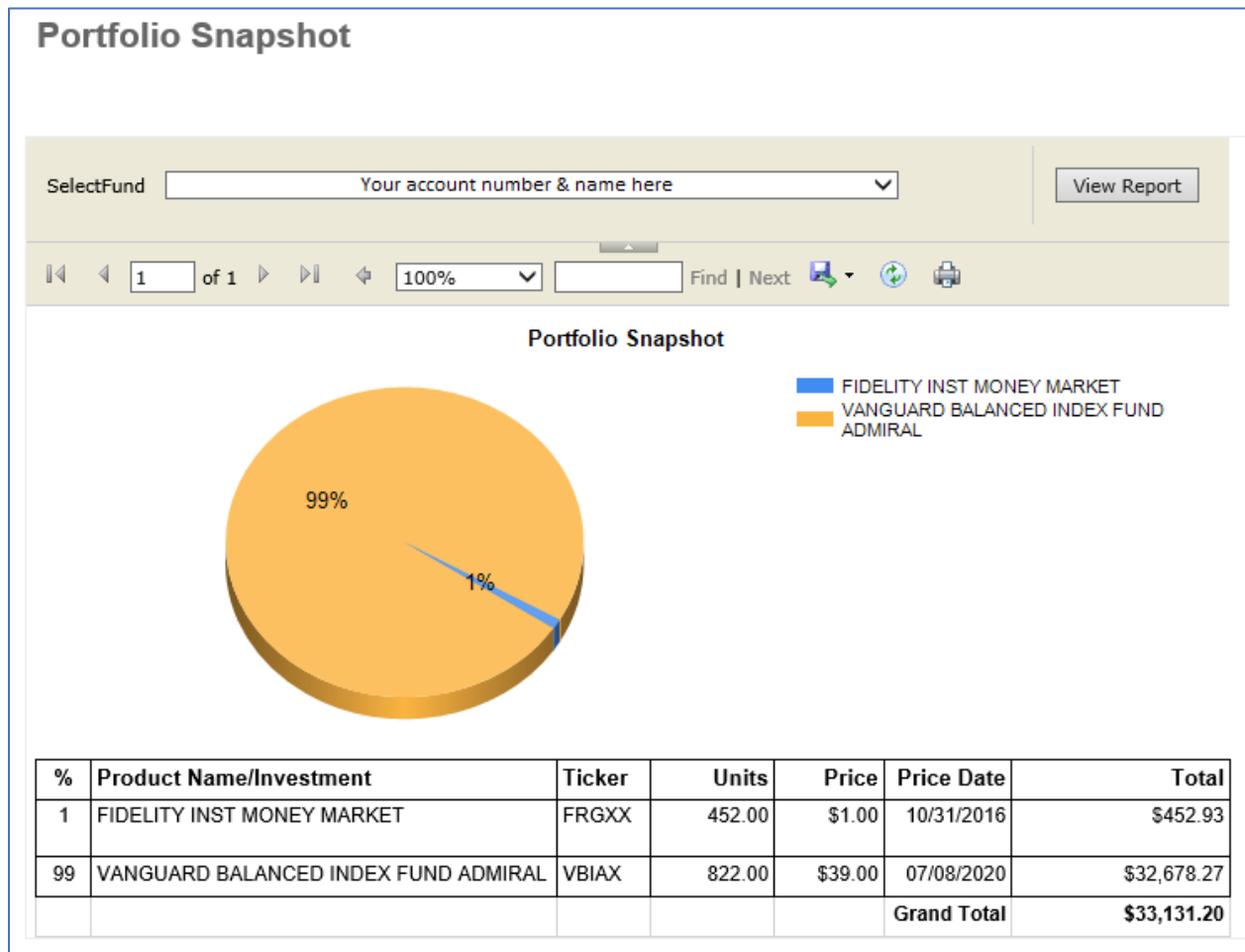
	Status	Date Paid	Amount	Anonymous Fund	Anonymous Advisor	Recipient	City/State	Designation
<input type="button" value="..."/>	PROCESSED	11/19/2019	\$5,000.00			Presbyterian Night Shelter	FORT WORTH, TX, 76113	FOR THE CAMPAIGN FOR CAMPUS RENEWAL AT THE... See more
<input type="button" value="..."/>	PROCESSED	11/19/2019	\$7,680.00			National Ghost Ranch Foundation Inc.	ABIQUIU, NM, 87510-2001	NO RESTRICTIONS
<input type="button" value="..."/>	PROCESSED	11/19/2019	\$5,000.00			Presbyterian Mission Agency (Voucher Remittance Processing)	PITTSBURGH, PA, 15264-3700	PRESBYTERIAN DISASTER ASSISTANCE TO BE USED IN THE... See more
<input type="button" value="..."/>	PROCESSED	7/24/2019	\$250.00			First Presbyterian Church	SOME CITY, IN, 12345	THIS DONATION IS MADE TO THE GLORY OF GOD AND IN... See more

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.



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.

Manage Investment Strategies

Use the Edit Investments to change your investment strategy.

Fund Your account number & name here
* Indicates you are an advisor for this fund.

Current Net Assets \$33,131.20

[+ Edit Investments](#)

Investment Strategy Custom Strategy
Use this option to create your own custom investment strategy

Investment	Current %	Pending %	Amount
Vanguard Balanced Index Fund Admiral (VBIAX)	100%		\$33,131.20

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.

Investment Strategy

Investment Strategy: Custom Strategy [?](#)

Use this option to create your own custom investment strategy

[+ Add Investment](#)

Investment	Current %	Pending %
Vanguard Balanced Index Fund Admiral (VBIAX)	100%	<input type="text"/> %

[Save](#) [Cancel](#)