**Fund Advisor Portal**

Blue Grass Community Foundation provides Fund Advisors with online access to the fund(s) they manage via the BGCF Fund Advisor Portal. Available 24 hours a day, the BGCF Fund Advisor Portal provides a convenient and easy way to manage your fund(s). Using the portal, fund advisors can view and download a history of donations made to the funds they manage; view and download a history of grants sent out from the fund; make grant recommendations from the fund; access monthly fund statements; and access tax receipts.

**Setting Up Your Access to the Fund Advisor Portal**

You will be emailed a link to access the Fund Advisor Portal. Select the link and you will be prompted to create your own password for the portal site. Once your password is created, you can then continue to the Login page, where you will enter credentials you have created and log in.

**Navigating the Fund Advisory Portal**

Once you have successfully logged in, you will have access to the funds you manage. If you are an advisor for only one fund, you will go directly to the Home page for that fund.

If you serve as an advisor for multiple funds, you will see the “Choose Fund” menu once you have successfully logged in to the Fund Advisor Portal. Choose the particular fund with which you want to interact.

Once you have logged in and selected the fund you want to review, you can select the tabs at the top of the page to review the different areas available to you as a Fund Advisor:

- **Home** tab shows the fund’s Current Balance plus the Spendable Balance (if applicable). This area also lists all fund advisors, shows recent contributions and recent grants given for the fund.
- **Fund Contributions** tab shows all contributions or donations to the fund.
  - Clicking on a Contributor’s name will bring up their history of contributions.
- **Grants** tab will show the history of Grants made from the fund.

  As a Fund Advisor you are able to recommend grants from the fund’s assets by clicking into the “Recommend A Grant” tab. Please note that this tab is only available to those users who have permission to make recommendations from the fund.
The left side of the screen is the form you will fill out to create a Grant Recommendation.

There are various options for selecting the grantee:

- **Previous grantees** – this is a dropdown menu that has all of the organizations to which you have previously granted. You can click on any organization from this list to create the grant recommendation.

- **Other foundation funds** – if you are wanting to donate to an existing fund held at Blue Grass Community Foundation, you will select this dropdown menu and click on the fund to which you would make a grant.

- **Search for other Grantees** – if you are wanting to search for an organization to which you have not previously granted, you have the ability to search the BGCF grantee database by entering the name or keywords in this field and clicking on “search.” If the organization does not already exist in the BGCF grantee database, you will be prompted with the option to search in the GuideStar database, which is a national database of all verified nonprofits. If you locate your desired grantee in either the BGCF database or Guidestar results, simply click on “Create Request” to create the grant recommendation.

- **Enter Grantee Information Manually** - if you are not successful at locating your desired grantee in the above searches, you are able to enter the grantee information manually in the form at the bottom of the screen by including all required information.

Once the Grantee information has been added, you will continue to fill in the grant information as prompted.

- Use the **Description** field to enter the designation or purpose of the grant (e.g., general support; capital campaign, mission project, etc.).

- By default, the name of fund, as well as the name and mailing address of the fund advisor will be included in the grant transmittal letter that accompanies the grant check. If you prefer that the grant be made completely anonymously, click on **Anonymous**. If you prefer that the fund name be included in the grant transmittal letter to the grantee, but would like the fund advisor information to be anonymous, do not click the Anonymous button, but rather make mention of this request in the Special Instructions field.

- If you would like to make your grant recurring (for instance $100 each month or $1,000 each year), click on the **Recurring** button. Please note that the amount entered will be the amount of the grant for each occurrence. You will be prompted to set a start date, as well as the interval (monthly, annual, quarterly, etc.). You also have the option to set

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the number of recurring grants or you can leave this field blank, which will leave the grants to recur indefinitely until you contact BGCF to stop them.

- You have the ability to upload an Attachment of a document, if this is helpful in relaying additional information about the grant you are recommending.
- You can use the Special Instructions field to include any additional information regarding this grant. For instance, if the grant you are recommending is in honor or memory of someone, you would include this information here.
- Once the recommendation form is complete, click on Review to review your request and then click Submit to submit your recommendation.
  - The right side of the Grants tab screen includes grants that have been previously recommended from the fund with the current status.
  - Grant Recommendations still in the “Request” status can be canceled by clicking on the indicated icon.

- The “Fund Statements” tab will show fund statements if they are setup for the fund. Fund Advisors will be able to view newly created fund statements immediately after they are created as well as past fund statements.
  - Printing Statements - The system will generate a PDF in a new window in your web browser that you may save or print.
- The “Tax Receipts” tab allows you to generate a charitable contribution tax receipt for contributions that you have made to your fund. Click on the ID# of the contribution to generate the tax receipt that you can download or print.
- Remember to use the “Logout” tab to close the Fundholder Portal. You will be automatically logged out each night even if you do not logout.

Locked Out of your Fundholder Portal?
If you are locked out of the Fundholder Portal, click Forgot Password on the login page. Enter your username and click the Reset Password button. If a user account with the provided username is found, instructions to reset your password will be sent to the email address for that account. If you are still having trouble, please contact BGCF at (859) 225.3343.

Alerts
BGCF can alert you every time a Donation is made or a Grant is paid out from your Fund. These alerts can be utilized or cancelled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations.
- If you wish to be notified of each donation and/or grant requested and paid, contact BGCF at (859) 225.3343.