



FUND ADVISOR PORTAL

USER GUIDE

TUTORIAL

How To Access Your Portal

As a Fund Advisor, you have an online Fund Advisor Portal where you can access information about the funds you advise anytime, anywhere! Log into www.kcfoundation.org and click on Fund Advisor Portal in the top right of the screen.

How to Navigate Your Fund Advisor Portal

Learn about the many options that are available to you through the Fund Advisor Portal. This section will detail the benefit of each option to you and walk you through each step for easier navigation.

Frequently Asked Questions

Find answers to frequently asked questions while you become familiar with the Fund Advisor Portal. This section is a great reference page when you first begin.





FUND ADVISOR PORTAL

HOW TO ACCESS YOUR PORTAL

Step One

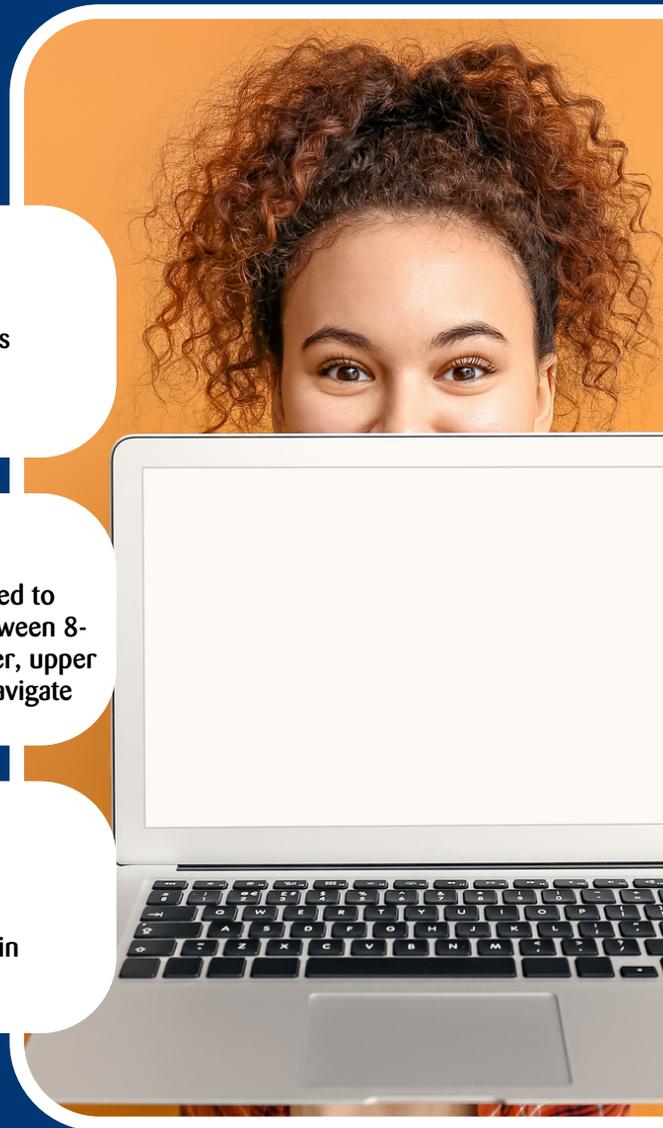
The Community Foundation will send you login credentials and a link to access your Fund Advisor Portal via e-mail. This link will come from no-reply@fcsuite.com and reference *Kosciusko County Community Foundation Fund Advisor Online Access Info* in the subject line.

Step Two

After receiving the e-mail, click the link. You will be prompted to create your own password. Your password needs to be between 8-32 characters and must include at least one lower case letter, upper case letter, number, and special character. Once created, navigate to www.kcfoundation.org and click Fund Advisor Portal.

Step Three

Once you have successfully signed into your Fund Advisor Portal with your new password, you are ready to begin. The Fund Advisor Portal option remains housed on our website in the top right corner.





FUND ADVISOR PORTAL

HOW TO NAVIGATE YOUR PORTAL

Home

This tab shows a summary of the fund's current balance plus the spendable balance, if applicable. Total contributions and grants are listed as well as the names of the fund advisors.

Choose Fund

This tab is visible if you are a fund advisor to other funds and allows you to return to the list of funds that you advise.

Contributions

This tab shows all contributions or donations to the fund. Click on a contributor's name to bring up contribution details. Note: the export button on the right will convert the information into an Excel file for you.





FUND ADVISOR PORTAL

HOW TO NAVIGATE YOUR PORTAL

Grants

This tab shows the grant history of the fund. Scrolling down provides an itemized list of grants. Look for the word Complete in the status column to know the grant has been paid.

Grant Request (For Donor Advised Funds Only)

This tab allows you to recommend a grant to a charity or a fund. You can create a new grantee manually or by searching in the Search box. Once the grantee information has been added, click "Add to Grant Requests." You must click "Review and Submit" before your grant request is final.

Statements

This tab shows statements related to the fund. Statements are generated twice annually during the months of January and July. If you require a statement at a different time or for a different time frame, please contact us at 574-267-1901, or e-mail leanne@kcfoundation.org.





FUND ADVISOR PORTAL

HOW TO NAVIGATE YOUR PORTAL

Fund Agreement

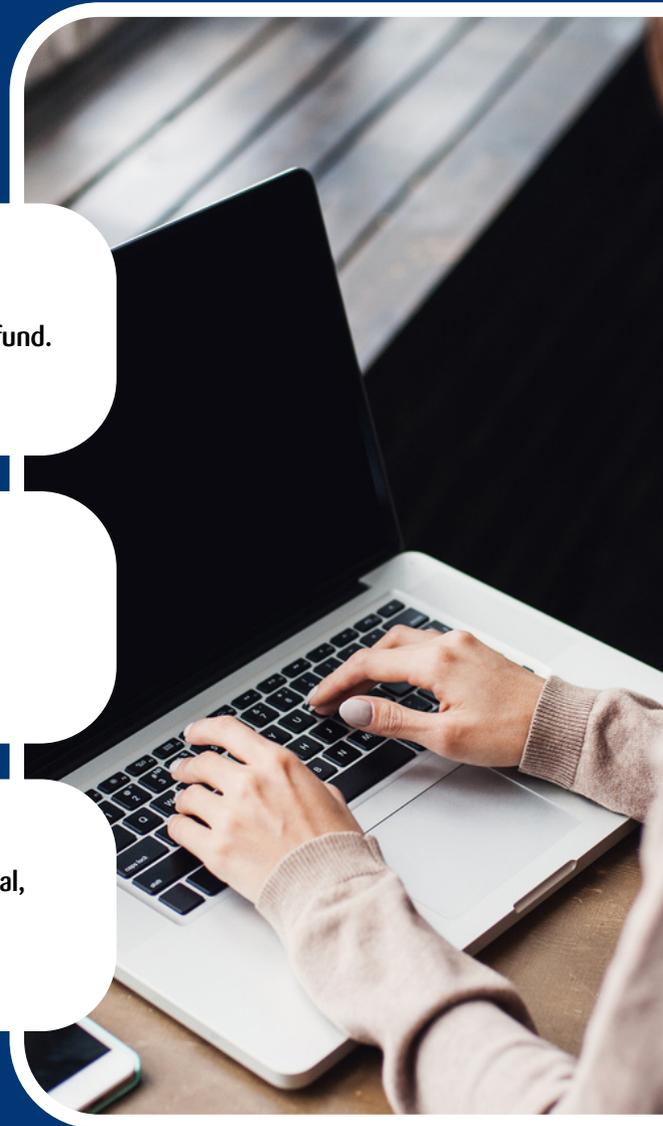
This tab includes a link to the fund agreement between the Community Foundation and the donor who established the fund.

Logout

Use this tab to close your current login session on the fund advisor portal. We encourage you to log out when you are done accessing your fund.

Questions

If you have any questions regarding your Fund Advisor Portal, please contact the Community Foundation at 574-267-1901 or e-mail kcf@kcfoundation.org.





FUND ADVISOR PORTAL

FREQUENTLY ASKED QUESTIONS

Where do I log in to the portal?

Upon visiting the Community Foundation website at www.kcfoundation.org, navigate to the top right of the screen and click Fund Advisor Portal.

I didn't get the activation e-mail. What do I do?

Check your spam/junk folder for an e-mail from no-reply@fcsuite.com. If you still do not receive it, contact the Community Foundation at 574-267-1901 to assist you.

The URL from the e-mail does not work. What do I do?

The URL from the auto-generated email (no-reply@fcsuite.com) can only be used to establish your password the first time. To access after this, log in through our website, www.kcfoundation.org, by clicking on Fund Advisor Portal in the top right of the screen.





FUND ADVISOR PORTAL

FREQUENTLY ASKED QUESTIONS

Forgot username and password?

Your username is your email address. If you have forgotten your password, click **Forgot Password** on the login page. Enter your username and click the **Reset Password** button. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account.

What is included in the current balance?

The current balance reflects investment activity and quarterly fees through the prior month end; as well as recent contributions and grants as listed in the portal.

Where can I see all donations and grants?

The home tab shows a recent summary of donations and grants. To see a full history of grants from the fund, click on the **Grants** tab. To see a full history of donations to the fund, click on the **Contributions** tab.





FUND ADVISOR PORTAL

FREQUENTLY ASKED QUESTIONS

How often can I expect to see fund statements?

You can expect to see statements posted to the portal twice annually during the months of January and July. If you require a statement at a different time, or for a different time frame, please contact us at 574-267-1901 or email leanne@kcfoundation.org.

How will I know if a donation is made?

The Community Foundation will alert you by e-mail each time a donation is made to or a grant is paid out from your fund.

Can I change my profile information?

Click the Profile link in the upper right area of your Fund Advisor Portal. You can click the Edit button to edit your login, address, e-mail, and phone. Additionally, you can change your Fund Advisor Portal password. Click the Save button to keep the changes.

