

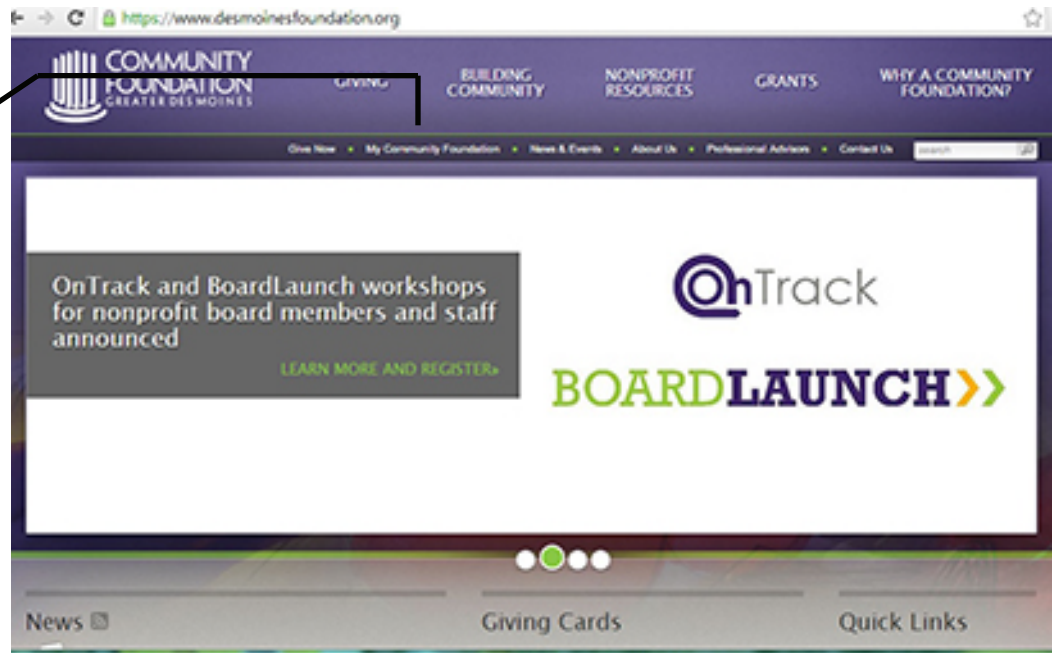


How to use Manage My Fund

Your personal online tool for managing the fund(s) you establish at the Community Foundation of Greater Des Moines.

Getting Started

To log on to Manage My Fund, click My Community Foundation on the homepage of the Community Foundation's website at www.desmoinesfoundation.org.

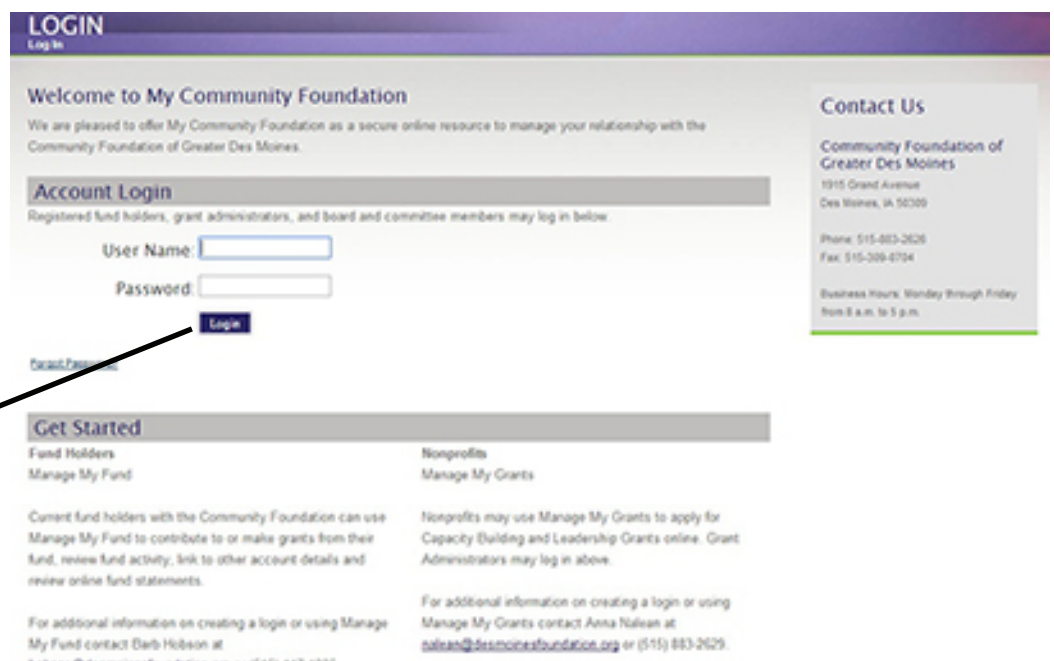


Entering Your User Name and Password

Enter the user name and password you received from the Community Foundation via email or mail.

If you need this information, contact the Community Foundation at 515-447-4206. The first time you sign on you will be prompted to change your password.

Then click log in.



Manage My Fund Donor Dashboard

This page explains all you can do while logged on to Manage My Fund.

You can:

- * view your fund activity
- * review your fund contributions
- * recommend grants
- * research an extensive database of nonprofit organizations supported through the Community Foundation
- * review the list of grants you want to recommend
- * update your profile information
- * access electronic fund statements and choose to receive notifications via email when statements are available through Manage My Fund.

MY FUND
Manage My Fund | Donor Dashboard

Donor Dashboard

If you represent more than one fund at the Community Foundation, please select a fund from the fund selector drop-down to begin.

Fund
Smith Family Charitable Fund | Fund Id 40770
Community Foundation of Greater Des Moines

Fund Balance
(\$5,250.00) (Spendable)
\$505,926.32 (Market Value)

Statements
No statements found.
[See All Fund Activity and Statements](#)

Contact Me
Your Donor Relations Contact

Kristi Locke
klocke@desmoinesfoundation.org

Go Green
 Check here -- if you would like to be notified by email when your statement is available online.
You are currently set up to receive an email when your statement is available online.
[Recommend a New Grant](#)

Total Contributions
Recent Contributions

Amount	Type	Date
\$54,250.00	Stock	11/15/2013
\$3,000.00	Wire Transfer	11/15/2013
\$50,000.00	Wire Transfer	11/15/2013

[See All Contributions](#)

Grant History

Recent Grants	Grant Actions
United Way of Central Iowa 11/15/2013 \$500.00	View New Repost
Science Center of Iowa 11/15/2013 \$750.00	View New Repost
Food Bank of Iowa 11/15/2013 \$2,000.00	View New Repost
Edmundson Art Foundation, Inc. 11/15/2013 \$1,500.00	View New Repost
Central Iowa Shelter & Services (pending) \$5,000.00	View New Repost

[See All Grants](#)

Fund Activity

On this page you can view:

- * gifts to your fund
- * grants paid from your fund
- * grant recommendation(s) pending (submitted but not yet made)
- * total market value

You can also download previous fund statements and export them as either Excel or Pdf documents.

MY FUND
Manage My Fund | Fund Activity

Fund Activity

Fund
Smith Family Charitable Fund | Fund Id 40770
Community Foundation of Greater Des Moines

Search Fund Activity
Fund Activity from:
Last 30 Days
[Advanced Search](#)
[Submit](#)

Give to My Fund

Get Statements:
[Get Acrobat Reader](#)

Fund Activity Summary
Below is a summary of your fund's activity based on the time period selected.

Beginning Balance:	\$458,176.32
Contributions:	\$53,000.00
Grant Distributions:	(\$5,250.00)
Earning Allocated to Fund:	\$0.00
Administrative Fees:	\$0.00
Other Activity:	\$0.00
Change in Market Value:	\$0.00
Ending Balance:	\$505,926.32

Fund Activity Detail
Ending Balance: Report from 10/21/2013 to 11/20/2013

Description	Amount
Cash	\$47,750.00
Long-Term Growth Portfolio	\$456,984.59
Money Market Portfolio	\$1,191.73
Total	\$505,926.32

Contribution Activity

This is an example of a page showing detailed contribution activity.

Donor Dashboard

Fund Activity

Contribution Activity

Recommend Grants

All Grant History

Single Grants

Recurring Grants

Fund Relationships

My Documents

Give to My Fund

My Profile

Contribution Activity

Fund: Smith Family Charitable Fund

Smith Family Charitable Fund Fund Id 40770
Community Foundation of Greater Des Moines

Contribution Activity Search

Duration: Last 30 Days [Advanced Search](#)

Contribution Activity Details

Donor	Desc	Type	Status	Trans ID	Date	Amount	Gift Receipt	Receipt Sent
Miscellaneous Donor	Apple Inc.	Stock	Approved	46006	11/15/2013	\$54,250.00		
Miscellaneous Donor	Cash	Wire	Posted	46007	11/15/2013	\$3,000.00		
Miscellaneous Donor	Cash	Wire	Posted	46013	11/15/2013	\$50,000.00		

[Export to Excel](#) [Export to Pdf](#) [Export to Excel](#)

In this view of cumulative gifts to your fund, you can find detailed information on gifts including:

- * **date** of the gift
- * **name** of the donor
- * **description** of the gift
- * **amount** of the gift

This page also indicates when a gift receipt was sent. Below the contribution activity are links allowing you to export contribution activity into an Excel or Pdf document.

Give to My Fund

Please select a fund from the drop-down fund selector and choose the fund you would like to make a credit card contribution to.

Fund

Smith Family Charitable Fund

Smith Family Charitable Fund Fund Id 40770
Community Foundation of Greater Des Moines

Donation Details

Total Amount: \$0.00

Description: Smith Family Charitable Fund

Contributor Information

First Name: Sara

Middle Name:

Last Name: Bonney

Company Name:

Select: 1915 Grand Avenue, Des Moin

Mailing Address: 1915 Grand Avenue
Des Moines, IA 50309

Use Same Address For Billing Address

Phone Number:

Cell Phone Number:

Email Address: bonney@desmoinesfoundation.org

Please notify this person of this gift

Name:

Address:

City, State, Zip:

Giving to a Fund

Start by clicking **Give to My Fund**.

Your information will automatically populate in many of the required fields, but you do have the opportunity to change or update information as necessary.

After determining and entering the amount you would like to contribute to the fund select **Submit**.

The next screen will ask you to enter the method of payment you will be using to make your contribution. Once you select **Submit** on this screen your gift is complete.

Add a Grantee Organization

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Fund
Smith Family Charitable Fund
Smith Family Charitable Fund Fund Id 40770
Community Foundation of Greater Des Moines

Search Grantee Organizations
Grantee Name:
 Pre-approved Grantees Only

Your Results

Grantee Organization Name	Address	Tax ID	Actions
Community Foundation of Greater Des Moines	1915 Grand Avenue Des Moines, IA 50309		Add to My Grantee List
Above & Beyond Cancer, Inc.	809 W Hill Street, Suite D Charlotte, NC 28208	45-3951308	Add to My Grantee List
Bravo Greater Des Moines, Inc.	700 Locust Street, Suite 100 Des Moines, IA 50309	20-3598346	Add to My Grantee List
Community In Schools of Iowa	1620 Pleasant Street, Suite 242 Des Moines, IA 50314		Add to My Grantee List
Des Moines Social Club	PO Box 93301 Des Moines, IA 50393	32-0225243	Add to My Grantee List
Free Clinics of Iowa	PO Box 12099 Des Moines, IA 50312	42-1428706	Add to My Grantee List
Greater Des Moines Public Art Foundation	c/o Rowe Consulting, LC 418 6th Avenue, Suite 903 Des Moines, IA 50309	20-1282095	Add to My Grantee List
Hawthorn Hill	3001 Grand Avenue Des Moines, IA 50312-4206	42-1258470	Add to My Grantee List

Research an Organization

To find out more information about the array of nonprofit organizations supported through the Community Foundation, click **Recommend a Grant** and then **Search Grantee Organization**.

This example shows results you'll find when you type in an organization name. Click on the name to view:

- * contact information
- * a link to the website
- * the organization's tax ID number

If you choose to support a group from your search, click **Recommend a Grant**.

Grant Entry

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I would like to recommend a grant to:
Orchard Place
Address 2118 Grand Avenue, Des Moines, IA 50312

Recommended Grant Amount:
 As a Single Payment
 As a Recurring Payment

Balance (\$5,250.00)
Warning: Available Balance is negative.
Amount \$0.00

Other Grant Recommendation Details:
Grant Purpose Grant Distribution
 Please make this Grant Recommendation anonymous.

Special Instructions to Community Foundation Staff:

Grant Entry

You'll see this form every time you choose to recommend a grant. If you recommend a grant to a nonprofit in our database, the information will be complete. When granting to nonprofits that are not in our database, please fill out the entire form.

On the form you can select if you would like to recommend the grant as a single or recurring payment. The fund balance available for granting is listed for your reference to assist you in selecting the recommended grant amount. This screen also allows you the opportunity to make your grant recommendation anonymous or write special instructions for the Community Foundation staff.

Select **Submit** to complete the grant recommendation.