

# Fund Advisor Portal Step-by-Step Guide



As a fundholder of the Community Foundation for Greater Atlanta, you can access your fund information online through our Fund Advisor Portal. Within the portal, you can easily check your fund balance, view and download fund statements, request and track grants (or scholarships), add to your fund and more. The Fund Advisor Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

## CREATING YOUR ACCOUNT

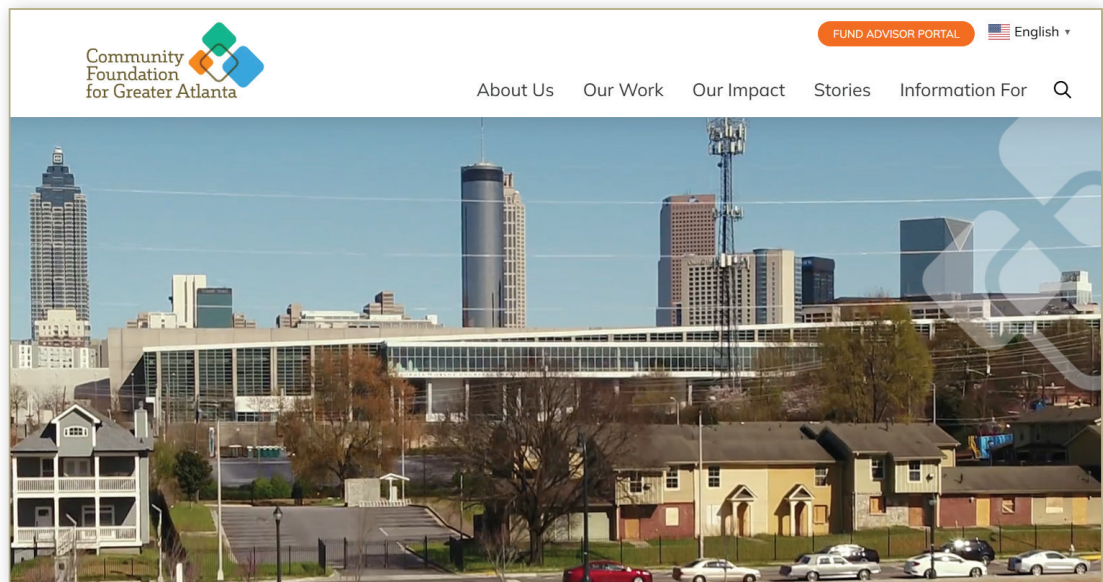
Please contact us at [help@cfgreateratlanta.org](mailto:help@cfgreateratlanta.org) to create your account.

## RETURNING USERS

To access the Fund Advisor Portal at any time, visit [cfgreateratlanta.org](http://cfgreateratlanta.org) and click on “Fund Advisor Portal” in the header bar of our website (see arrow in sample screen).



Home page



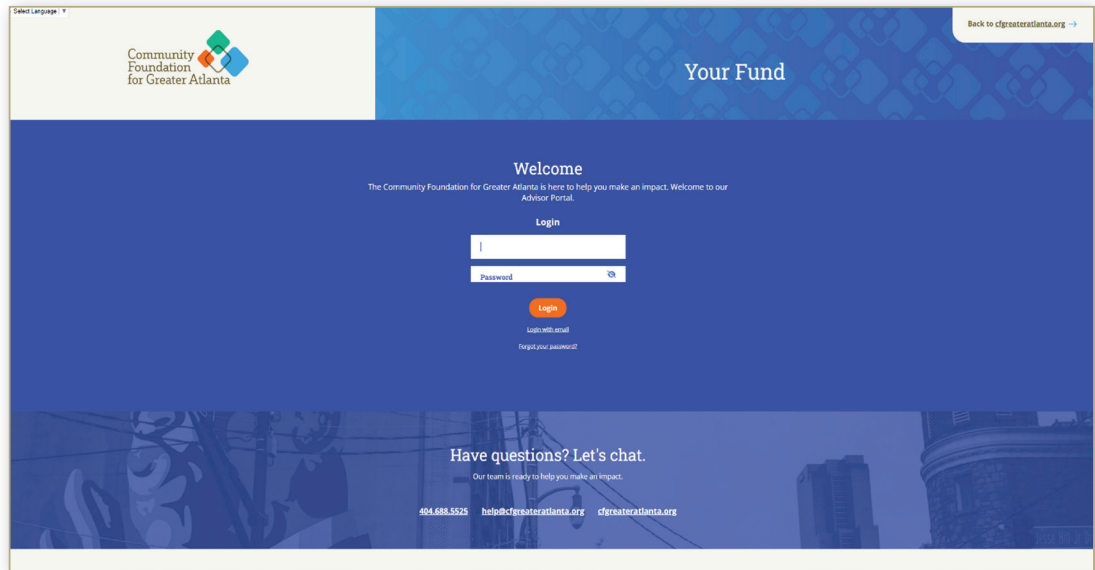
This will take you to the login screen where you will enter your username and password.

The Foundation team does not have the ability to access your password. If you forget your password, you can reset your password on the Fund Advisor Portal login page by clicking on the “Forgot your password?” link.

**Note: The Fund Advisor Portal will lock you out after five unsuccessful login attempts.** If you are locked out, please contact our team at [help@cfgreateratlanta.org](mailto:help@cfgreateratlanta.org).



Login page



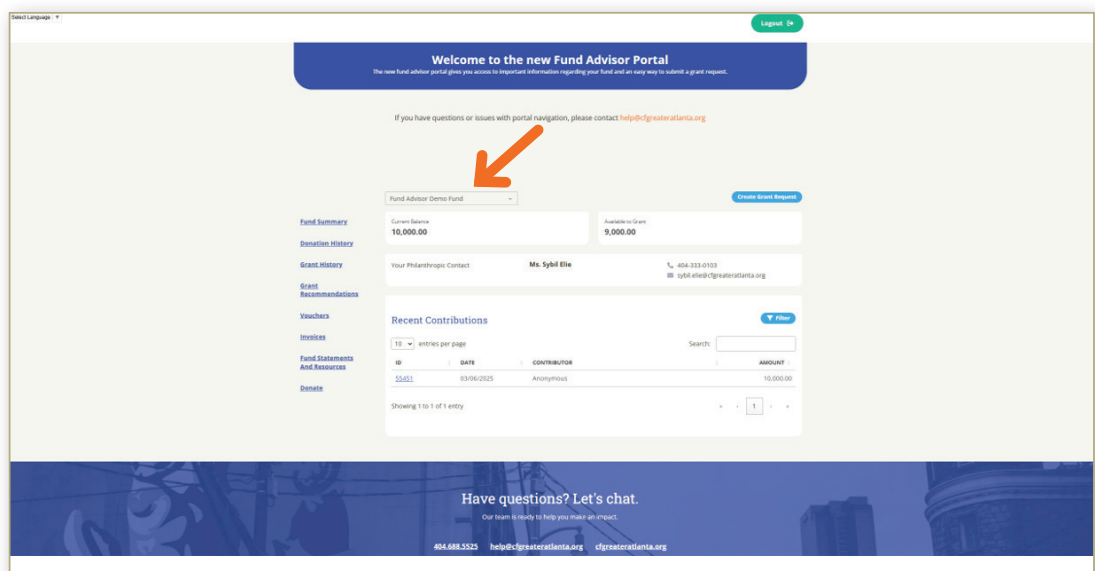
Visit [cfgreateratlanta.org](http://cfgreateratlanta.org) from any web browser or device (including smartphones and tablets) to access the Fund Advisor Portal system.

**IMPORTANT:** If you access the Fund Advisor Portal from a shared computer or device, we strongly encourage you to use the Logout option after completing each session. This ensures no one other than you has access to the system.

### FUND ADVISOR PORTAL FEATURES

Once you are logged in, your fund's homepage will appear, and you will see your Fund Summary. If you have multiple accounts, you can view them in the drop down window marked by the arrow below.

Fund summary





The tabs at the top of the page display different features available to you as a Fund Advisor:

**Fund Summary** – Quick snapshot of your fund’s most recent activity, including your current balance, your philanthropic contact and recent contribution.

**Donation History** - Lists the donations made to your fund.

**Grant Summary** – Where you can view your total grant history by grantee name.

**Grant History** – Where you can view and sort your grant history by date, amount or recipient.

**Grant Recommendations** – Make a grant recommendation from your fund.

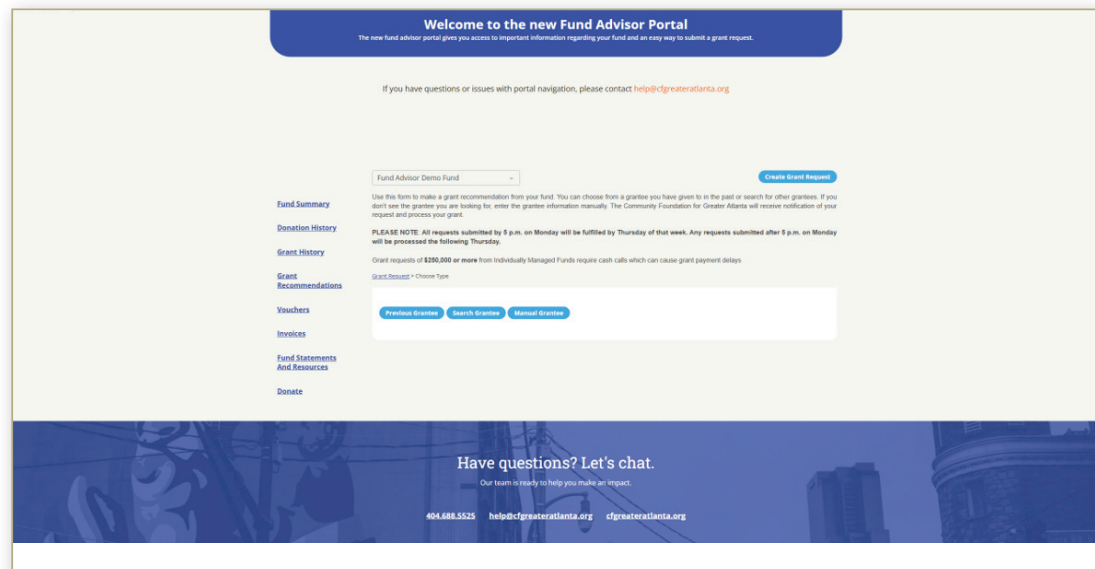
**Fund Statements and Resources** – Access and review your quarterly fund statements.

**Donate** – Takes you to our Giving Hub to make donations via credit card.

## SUBMITTING A GRANT REQUEST

To recommend a grant from your fund, click “Create Grant Request.” This will give you the option to choose from previous grantees, search for a grantee to fund or enter grantee information manually.

Create grant request





### Grant request form

**Grant Request**

Requested By: [Dropdown menu]

Grantee: [Text input]

Description: [Text input]

Amount: [Text input]

Anonymous:

Attachments: [Choose Files]

**Add to Cart**

Use this form to make a grant recommendation from your fund. Once you fill out the form, click “Add to Cart.”

**NOTE:** “Description” and “amount” are required fields. Grant letters accompanying grant payments to nonprofit organizations automatically share the primary fund advisor’s name and mailing address. If you do not wish to share contact details, please check “anonymous” in the grant request form.

### Grant request cart

**Welcome to the new Fund Advisor Portal**

If you have questions or issues with portal navigation, please contact [help@cfgreateratlanta.org](mailto:help@cfgreateratlanta.org)

**Grant Request Cart**

Recipient	Description	Amount
Deniro Non-Profit Organization	Doing good work	1,000.00
<b>Grant Request Total</b>		<b>1,000.00</b>

**Review Grant Requests**

Once you choose your grantee and add to your cart, it will take you to the Grant Request Cart page. Here, you can review your Grant Request and make changes, if necessary. Next, click “Review Grant Requests.”



Review grant request

The screenshot shows the 'Grant Request Cart' section of the Fund Advisor Portal. The page has a blue header with the text 'Welcome to the new Fund Advisor Portal' and a 'Logout' button. Below the header, there is a navigation menu on the left with items like 'Fund Summary', 'Donation History', 'Grant History', 'Grant Recommendations', 'Vouchers', 'Invoices', 'Fund Statements And Resources', and 'Donate'. The main content area features a 'Grant Request Cart' table with the following data:

Grantee	Description	Amount	Anonymous
Demo Non Profit Organization 160 Central Avenue 4321 Main Street Atlanta, GA 30303	Doing good work Special instructions:	\$ 1,000.00	No
<b>Total</b>		<b>\$ 1,000.00</b>	

Below the table, there is a 'Submit Grant Requests' button and a note: 'Please be sure to hit the "SUBMIT GRANT REQUEST" to complete the process.'

**REMEMBER:** Once you click "Review Grant Requests," you're taken to the final click where you can submit your grant(s). Next, click "Submit Grant Requests."

Grant request submitted

The screenshot shows the 'Grant Request Submitted' confirmation message on the Fund Advisor Portal. The page layout is similar to the previous screenshot, but the main content area now displays a green box with the text 'Grant Request Submitted' and a 'Continue' button below it.

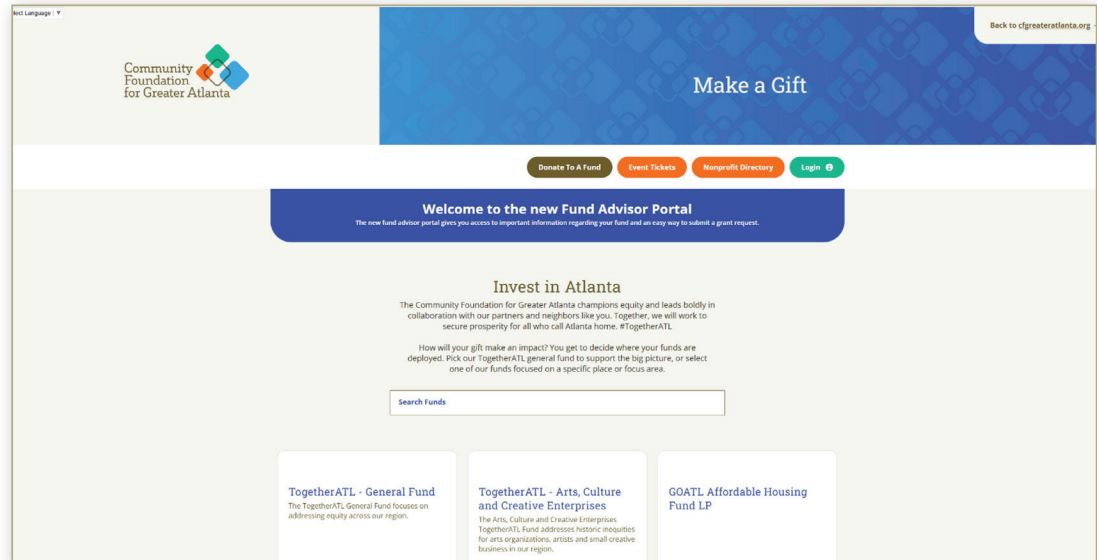
Here, you'll see confirmation of your submitted grant(s).



## DONATING VIA THE GIVING HUB

To donate to a public fund or cause, click the Donate tab. This button takes you to our Giving Hub, our public-facing giving center.

The giving hub



## FREQUENTLY ASKED QUESTIONS

### How is my name listed on grant payments?

Grant letters accompanying grant payments to nonprofit organizations automatically share the primary fund advisor’s name and mailing address. If you do not wish to share contact details, please check “anonymous” in the grant request form.

### How long does it take for my grant request to be processed?

Grant requests submitted by 5 p.m. on Mondays will be processed that Thursday. Requests submitted after 5 p.m. on Mondays will be processed the following Thursday.

### Who can I make grant requests to?

Grant recommendations must be made to qualified 501(c)(3) organizations (including schools, churches and government entities).

### What is the minimum amount for a grant request?

A \$100 minimum is required for each grant request.

### How often are Fund Statements posted?

Fund Statements are posted quarterly. To access your statements, click the “Fund Statements and Resources” tab in the Fund Advisor Portal.

### I’ve lost my password. What should I do?

Our team does not have the ability to access your password. You can reset your password on the Fund Advisor Portal login page by clicking on the “Forgot your password?” link.

If you still need assistance, please contact our team at [help@cfgreateratlanta.org](mailto:help@cfgreateratlanta.org).