



ASHLAND COUNTY

COMMUNITY FOUNDATION

— HERE FOR GOOD —

Advisor Portal Guide

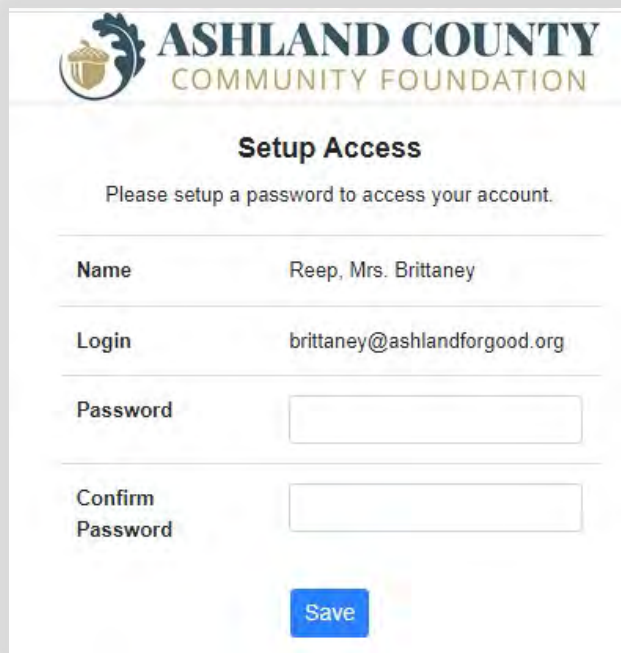
ADVISOR PORTAL GUIDE

Advisor Portal

As a fund advisor at the Ashland County Community Foundation, you have the ability to access your fund information online through the Advisor Portal. Within the portal, you can easily check your fund balance, view and download fund statements, review historic donation and grant information and add to your fund. The Advisor Portal makes it easy to manage your fund from anywhere at any time.

Initial Login Process and Creating Your Account

You will receive an email from ACCF with a custom invitation link to create your account in the Advisor Portal. Your username will be your email address that we have on file. If you would like to change your username for any reason, please contact Brittany Reep at brittaney@ashlandforgood.org. Once you click on the invitation link in the email, you'll be prompted to create a password of your choice.



The screenshot shows a web form titled "Setup Access" for the Ashland County Community Foundation. The form includes the following fields and content:

- Name:** Reep, Mrs. Brittany
- Login:** brittaney@ashlandforgood.org
- Password:** An empty text input field.
- Confirm Password:** An empty text input field.
- Save:** A blue button at the bottom of the form.

Returning Users

To access the Advisor Portal, visit ACCF's website at www.ashlandforgood.org and click the 'Advisor Portal' link at top of the homepage. You will be redirected to a login page where you will enter your e-mail address as your username and your unique password.

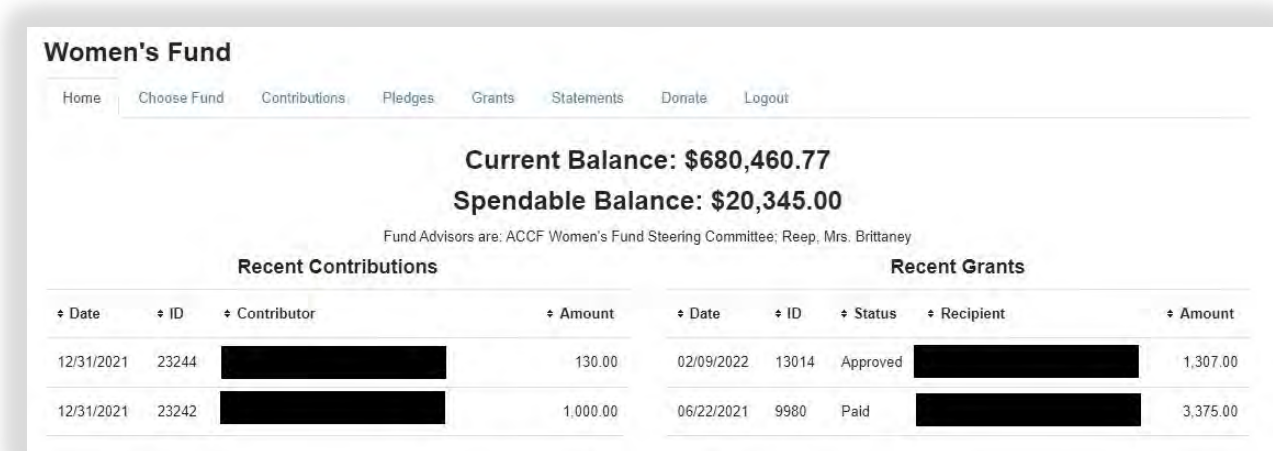


Forgotten Password

For security reasons, the ACCF team does not have the ability to access your password. If you need help remembering the password, click the 'Forgot Password?' link on the Advisor Portal log-in page. If you still need assistance, please contact Brittaney Reep at 419-281-4733 or brittaney@ashlandforgood.org and the password can be manually reset so a new one can be created.

Navigating the Portal

Home: The main home screen provides an at-a-glance view of your fund. Some of the key features found here include:



Women's Fund

Home | Choose Fund | Contributions | Pledges | Grants | Statements | Donate | Logout

Current Balance: \$680,460.77
Spendable Balance: \$20,345.00

Fund Advisors are: ACCF Women's Fund Steering Committee; Reep, Mrs. Brittaney

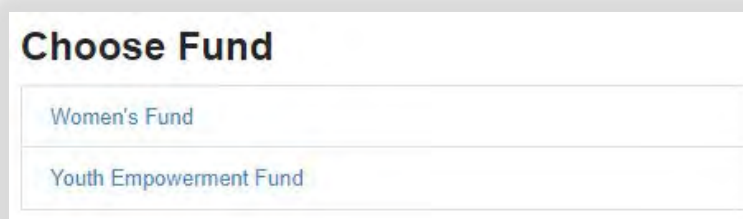
| Recent Contributions | | | | Recent Grants | | | | |
|----------------------|-------|-------------|----------|---------------|-------|----------|------------|----------|
| Date | ID | Contributor | Amount | Date | ID | Status | Recipient | Amount |
| 12/31/2021 | 23244 | [REDACTED] | 130.00 | 02/09/2022 | 13014 | Approved | [REDACTED] | 1,307.00 |
| 12/31/2021 | 23242 | [REDACTED] | 1,000.00 | 06/22/2021 | 9980 | Paid | [REDACTED] | 3,375.00 |

Current Balance: The amount in your fund as of the date viewed. *Please note that investment returns are only posted monthly and administrative fees quarterly, so your fund statement is still the most accurate picture of your fund's status.*

Available Cash: This is the amount available for grantmaking. If you have an endowed fund, you will have a **Spendable Balance** shown which is the result of the current year's spending policy calculation.

Recent Contributions and Recent Grants: This shows a quick snapshot of recent contribution and granting activity from the fund.

Choose Fund: If you serve as an advisor for multiple funds, you will see a "Choose Fund" tab that allows you to choose the fund in which you want to interact. If you are listed as an advisor for only one fund, this tab will not appear.



Choose Fund

- Women's Fund
- Youth Empowerment Fund

Contributions: This tab provides the detail for each gift received into your fund. You can click the 'export' option on the far-right side of the menu bar to export the details to an excel spreadsheet.

Youth Empowerment Fund

Home Choose Fund Contributions Grants Statements Donate Logout Export

Contributions

| Date | ID | Contributor | Description | Type | Amount |
|------------|-------|-------------|-------------|-------|----------|
| 12/28/2021 | 23057 | [REDACTED] | | Check | 1,000.00 |
| 12/08/2021 | 22593 | [REDACTED] | | Check | 100.00 |
| 12/08/2021 | 22598 | [REDACTED] | | Check | 25.00 |

By clicking on a specific donor's name, a detailed listing of giving by that donor to the fund currently selected will be shown. This will not be an option in the event a donor has chosen to remain anonymous.

Pledges: This tab only appears if any pledges have been made to the fund being viewed. The tab will provide a high-level view of each pledge made including the pledge date, donor, total pledged amount, and unpaid balance of the pledge. By clicking the "Balance", a detailed history of pledge payments made and applied against the pledge will appear.

Grants: This tab provides details on all grants paid from your fund. The top section provides a summary of grants by recipient (grantee). Information in this section includes the grantee, total number of grants awarded and total amount of grants. Scroll past the summary section to see grants listed from most recent to oldest. You can also click the 'export' option on the far-right side of the menu bar to export the details to an excel spreadsheet.

Grant summary view:

Women's Fund

Home Choose Fund Contributions Pledges Grants Statements Donate Logout Export

Grantee Summary

| Grantee | Grants | Amount |
|------------|--------|----------|
| [REDACTED] | 1 | 2,000.00 |
| [REDACTED] | 5 | 4,463.94 |
| [REDACTED] | 1 | 200.00 |

Grants by date view:

Grants

| Date | ID | Status | Recipient | Description | Amount |
|------------|-------|----------|------------|-------------|----------|
| 02/09/2022 | 13014 | Approved | [REDACTED] | [REDACTED] | 1,307.00 |
| 06/22/2021 | 9979 | Paid | [REDACTED] | [REDACTED] | 1,684.82 |
| 06/22/2021 | 9978 | Paid | [REDACTED] | [REDACTED] | 2,160.00 |

Statements: This tab contains access to your fund statements. Next to the statement you wish to view, click "Print" and the system will generate a PDF in a new window that you may view, save or print.


Women's Fund

[Home](#) [Choose Fund](#) [Contributions](#) [Pledges](#) [Grants](#) [Statements](#) [Donate](#) [Logout](#)

Statements

| Statement | Date Range | Status | |
|-------------------|-------------------------|--------|-----------------------|
| 20211001:20211231 | 10/01/2021 - 12/31/2021 | Final | Print |
| 20210701:20210930 | 07/01/2021 - 09/30/2021 | Final | Print |

Donate: This tab opens up a new window for you to make online gifts to your fund or any other ACCF fund.




ASHLAND COUNTY COMMUNITY FOUNDATION

[Home](#) [Donate To A Fund](#) [Logout](#)

To donate to an existing fund, type the fund name in the search box below, or choose from one of our featured funds. For a list of all our funds, click the "show all funds list" link next to the search box. If you have questions or would like to speak with staff that can help guide your donation, please call ACCF at 419-281-4733 or email accf@ashlandforgood.org.

Donate To A Fund


ACCF Operating and Unrestricted



Community Grants


[Donate](#) **Community Grants Fund**
Donations to this fund support our largest annual grant program—the Community Grants program. Nonprofit agencies can apply for Community Grants to fund programs and projects that have community-wide benefit.

Field of Interest



Women's Fund

[Donate](#) **Women's Fund**
The Women's Fund is all about women helping women find power and purpose. Gifts to the permanently endowed Women's Fund are invested, generating income to award grants to nonprofit organizations serving Ashland County women. The Women's Fund also awards an annual scholarship for a female, nontraditional student.



Youth Empowerment Fund

[Donate](#) **Youth Empowerment Fund**
Gifts to the James M. Cutright "CUTTY Fund for Youth Empowerment" support IMPACT Youth Grants. Our IMPACT Youth Council offers high school students the opportunity to serve as grantmakers. Members of the IMPACT Youth Council learn about the needs of youth in Ashland County, review grant applications and decide how grant dollars should be awarded from this fund.

FREQUENTLY ASKED QUESTIONS

I've lost my password. What should I do?

For security reasons, the ACCF team does not have the ability to access your password. If you need help remembering the password, click the 'Forgot Password?' link on the Advisor Portal log-in page. If you still need assistance, please contact Brittany Reep at 419-281-4733 or brittaney@ashlandforgood.org and she can manually reset your password so you can create a new one.

How often are fund statements posted?

Fund statements are posted the month immediately following the end of each quarter. You will be notified via e-mail when a new fund statements as been added and is ready to be viewed in the Advisor Portal. If you are not receiving these notification e-mails, please contact our office.

Who do I contact if I'm having issues with the Advisor Portal?

If you have any questions or are experiencing issues with the Advisor Portal, please contact Brittany Reep at 419-281-4733 or brittaney@ashlandforgood.org.