

HOW TO MANAGE YOUR GIVING FUND ONLINE

A quickstart guide to help you make the most of the “My Fund” section of our website

One of the best features of a Giving Fund with National Christian Foundation (NCF) is that you can manage all of your giving online, anytime on our website. Here you can recommend grants to charities, view your balance and history, easily run a report to see all gifts to a particular ministry, set up recurring grant recommendations so checks go out automatically, and print one simple report of your giving at tax time.

To get started, visit our website and click the “My Fund” button in the top-right corner of any page.



A QUICK LOOK AT THE MOST COMMON USES OF “MY FUND”

Enter your User ID and Password

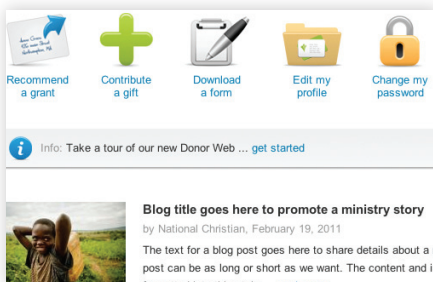
User ID:

Password:

[Log In](#)

LOG IN TO YOUR FUND

- Enter your User ID. This is typically your email address.
- Enter your Password.
- Click “Log In.”
- If you can’t remember your password, you can click “Forgot your Password?” to reset it and log in immediately.



SELECT WHAT YOU’D LIKE TO DO, OR BROWSE THE LATEST NEWS

- Choose from one of our quick-link options at the top of the page: recommend a grant, contribute a gift, download a form, edit your profile, change your password, or view investment reports.
- Or, browse the latest blog posts further down on the page to get the latest news, stories, and creative ideas about how to give with greater impact and grow in your journey of generosity.

ADD A CHARITY TO YOUR FAVORITES LIST

- Click “My Grants” on the right bar, and then click “Add a Charity” in the center.
- Type in the partial name of the charity (example: Young Life), and click “Search.”
- Select a charity from the list by clicking on its name. If the charity you’re looking for is not listed, click on “Suggest a Charity.”
- Enter the charity’s name, address, telephone number, and Tax ID# (if applicable), and click “Submit.”
- Then, recommend a grant to that charity (see instructions below).

RECOMMEND SINGLE OR RECURRING GRANTS

- From the “My Grants” page, click “New Grant” next to one of the charities you’ve added to your favorites list (in the center area).
- Select either single (one-time) or recurring (multiple, repeated) grants. If recurring, select the frequency and number of payments.
- Enter the contact name at the charity (optional), and in the “Grant Purpose” field, enter any comments you would like printed on the grant check letter (optional).
- By default, grant checks include a letter with the name of your Fund and your name and address. Click the checkbox to remain anonymous.
- To send a special request to our team at NCF, such as a change of address for the charity or other special handling, enter it in the “Processing Instructions” field.
- Click “Submit,” review and confirm your grant recommendation, and you’ll receive an instant email confirmation.

VIEW FUND HISTORY, MAKE A CONTRIBUTION, AND MORE

- To view your Fund’s historical activity, click on the “My Funds” link on the right bar (not the blue button at the top of the page). Then click on the “Activity” tab to search by date range, or click on the “Statements” tab for quarterly and annual PDF statements.
- To contribute a gift into your Fund, click “My Contributions” on the right bar and the “Fund My Account” tab to make a credit card gift. You can also click “Download Forms” on the right bar to get instructions on giving stocks, business interests, real estate, and more.
- Click “My Profile” on the right bar to manage your personal information with us or change your password.