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 that needs to be 8-32 characters and 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. The link will expire after 30 days.

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

Select Fund

This screen is only visible if you manage multiple funds. If you have one fund, you will go directly to the next line called Fund Summary.

Fund Summary

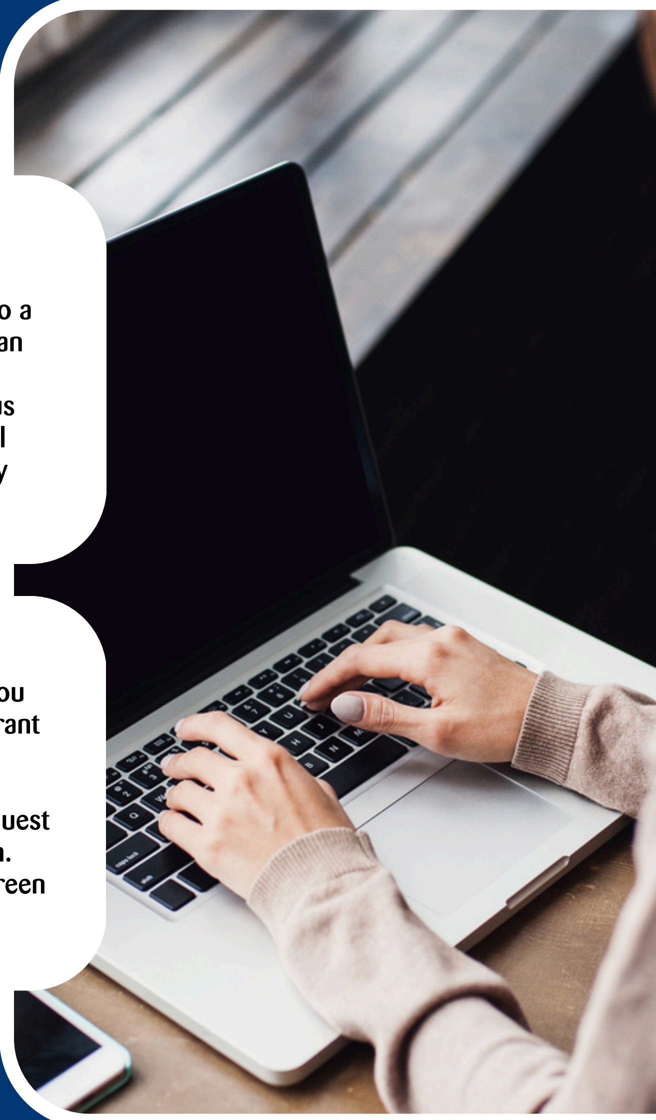
The Fund Summary screen shows a summary of the fund's current balance, contributions, and grants in addition to your staff contact information.

Fund Donations

This screen shows the individual donations given to this fund with donation date, contributor, amount, and other information. This information can be exported by clicking Export in the upper right corner.

FUND ADVISOR PORTAL

HOW TO NAVIGATE YOUR PORTAL



Grant Summary

This screen shows the summary of grantees and how much they have received from the fund. To view individual grants to a grantee, click the name of the grantee. On this screen, you can copy a previous grant if you wish to make the same grant again. You can view additional grant details, such as the status of the grant, by clicking the grant id number on the individual grant screen. The status of your grants can also be viewed by clicking “Grant Status” on the left-hand menu.

How To Make A Grant

Click “Create Grant Request” in the top right-hand corner. You can then click the button to indicate if you want to make a grant to a previous grantee or fund, another grantee that the Community Foundation serves, or manually enter a grantee. Once you select a grantee, you will be taken to the grant request form to put in the amount of the grant and other information. Once you input all the information, click review. The next screen will give you a summary of your grant and then you need to click “Submit” to finish submitting your grant.

FUND ADVISOR PORTAL
HOW TO NAVIGATE YOUR PORTAL

Profile

Use this screen to view your contact information that includes address, email, and phone number. This screen is where you can view your contact preferences and your interest types so we know what means the most to you!

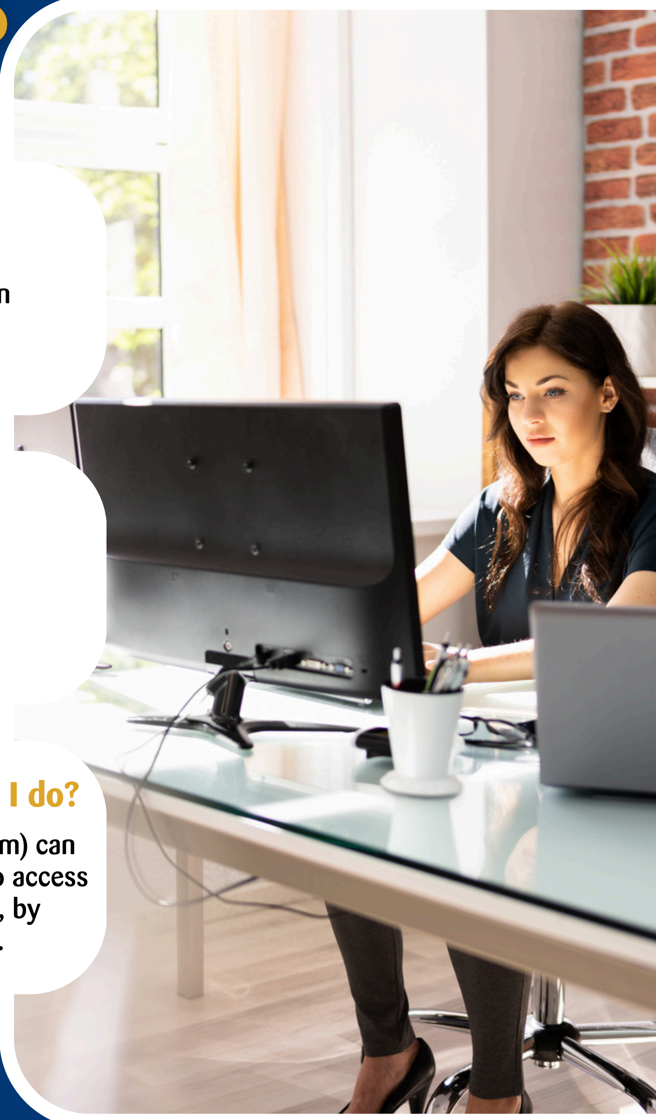
Resources & Documents

This screen shows fund statements and fund agreements. 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 call 574-267-1901.

Logout

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

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.

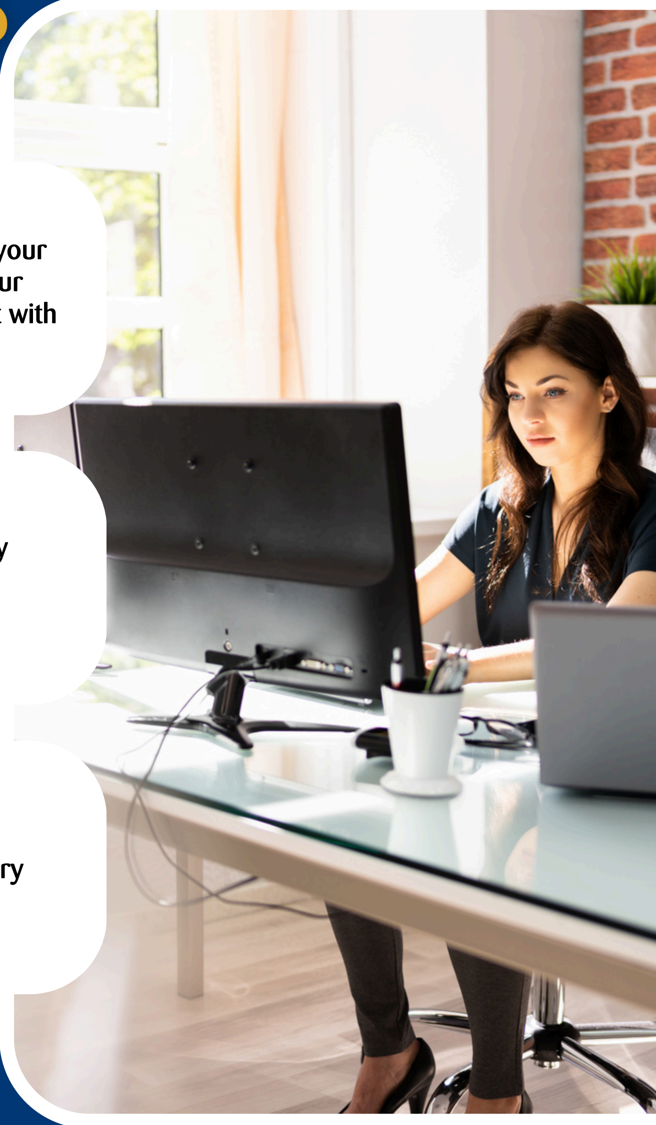
I didn't get the activation e-mail. What do I do?

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 esscreenlish 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.

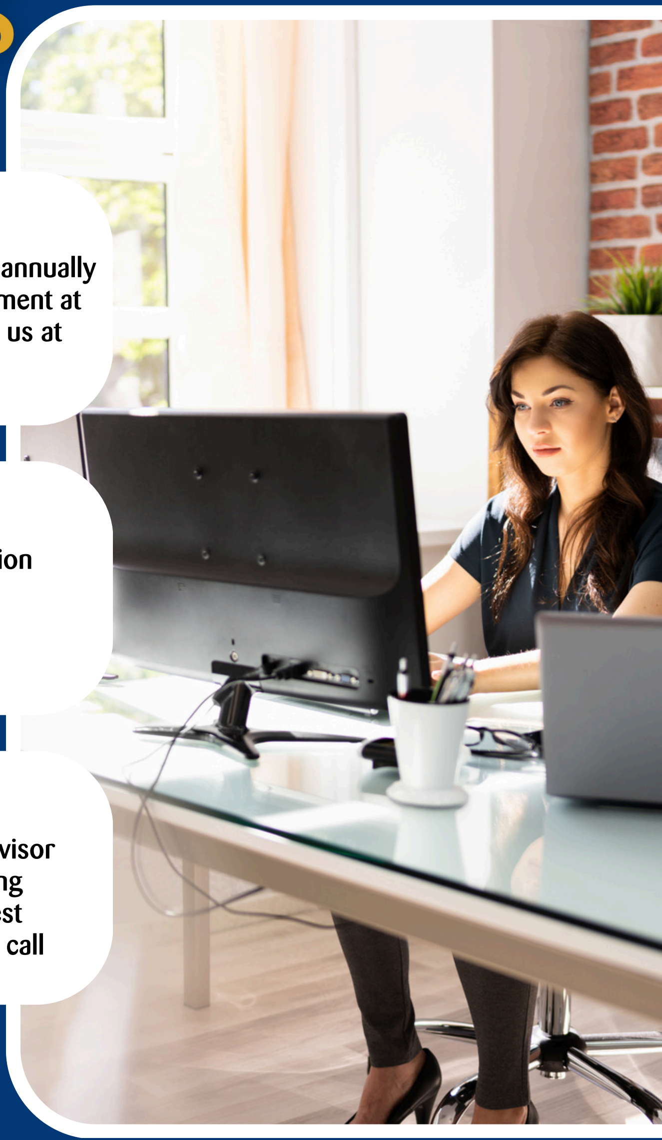
What is included in the current balance?

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 screen shows a recent summary of the fund's current balance, contributions, and grants. To see a full history of grants from the fund, click on the Grant Summary screen.

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 each time a donation is made to or a grant is paid out from your fund.

Can I view my profile information?

Click the Profile link in the upper right area of your Fund Advisor Portal. Here you can view your personal information including your address, e-mail, phone, contact preferences, and interest types. If you need to update any of your profile information, call 574-267-1901.