Dear Donor Advised Fund Advisor,

Your new fund advisor portal has arrived!

You have received this email because you are currently named as a Fund Advisor for one or more charitable accounts at the Community Foundation for Greater Rome.

We are excited to announce the arrival of our new Advisor Portal system. This portal allows you to interact with your account(s) via a secure, password protected website.

Many Fund Advisors have requested this functionality, so we are eager to get you into the new system as quickly as possible.

**Three Steps to Get Started:**

1. Over the next few hours, look for an email to arrive from sender "no-reply@fcsuite.com." You will see "Community Foundation for Greater Rome" referenced in the email's subject line. Some email programs might flag this message as spam, so please check your junk mail folder if it does not make its way to your inbox by the end of today.

2. Click the link within the email to start the simple set-up process. The system will guide you through the process and you will likely be up-and-running in under two minutes. **Be sure to take note of the username and password as you set-up your login.** Both items are case sensitive.

3. Once you have successfully completed the registration process, visit www.cffgr.org/portal to access the system at any time.

**Fund Advisor Portal Features**

Once you are on a fund's home page, you can select the tabs at the top of the page to review informational areas that are available to you as the Fund Advisor. Below is a summary of information for each tab.

- **Home** - This tab shows a summary of the fund's Current Balance plus the spendable balance, if applicable. Total contributions, grants, and scholarships are listed as well as fund advisors.
- **Choose Fund** - This tab is visible if you are a fund advisor to other funds.
- **Contributions** - This tab shows all contributions or donations to the fund dating back to January 2021.
    - Click on a contributor's name to bring up their contribution history.
- **Grants** - This tab shows the grant history of the fund.
    - Files related to the grant may be in the grant detail.
- **Grant Request** - This tab is a form that allows the fund advisor to make a Grant Request to a nonprofit, a grantee, or a fund.

    - A list of grant requests to be paid out along with their status is available.
        - Grants in the Request status can be canceled from this screen.
    - Grant Requests can be created.
        - Previous grantees and funds that you have given to can be selected from the drop-down lists.
        - You can create a new nonprofit or grantee manually by entering the name, address, zip code, and phone number. These are required to move the request to the Community Foundation for approval.
        - You can Search for other Grantees by using the Search box. Enter keywords and then click the Search button. The system will search GuideStar for organizations containing the keywords you used. The more keywords used, the better the search results will be.
            - GuideStar is an information service specializing in reporting on U.S. nonprofit companies.
        - Once the grantee information has been added, click the Submit button to complete the request.
- **Statements** – Quarterly fund statements will post directly to the Advisor Portal instead of landing in your email inbox as in the past. The first statements will post on the portal the week of April 17, 2023.
    - If you choose to print statements, the system will generate a pdf that you can save or print.
- **Files** - This tab allows you to view and download any files uploaded to the fund record.
- **Donate** - This tab takes you to the public Online Donations page where you can give to funds.
- **Vouchers** - This tab shows a list of vouchers paid by the fund.
- **Logout** - Use this tab to close your current login session on the fund advisor portal.

**Want to change your profile information (includes login, address, email, phone)?**

Click the Profile link in the upper right area of your fund advisor portal. You can click the Edit button to edit your login, address, email, phone, and add a note about the changes you are making. Additionally, you can change your fund advisor portal password and enable two factor authentication when logging in. Click the Save button to keep the changes.

**Locked Out of Your Fund Advisor Portal?**

If you are locked out of your account, 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. If you’re still having trouble, please contact your Foundation. Usernames are case sensitive in CommunitySuite.

**Alerts**

Your community foundation will alert you every time a donation is made, or a grant is paid out from your fund. These alerts can be utilized or cancelled at any point; but the alerts are not retroactive, so you will not be notified of past grants or donations.

**Account Balances**

Account balances are updated in real-time inside the Advisor Portal. Use the section labeled “Contributions” in the menu bar to review historical contributions received into the account from January 2021 to date.

**Help When You Need It:**

Email us at info@cffgr.org or call our office at 706.728.3453 to speak with us about the Advisor Portal website if you have questions.