

Fund Advisor Portal

for Unrestricted, Designated, Field of Interest,
Scholarship, and Agency Funds



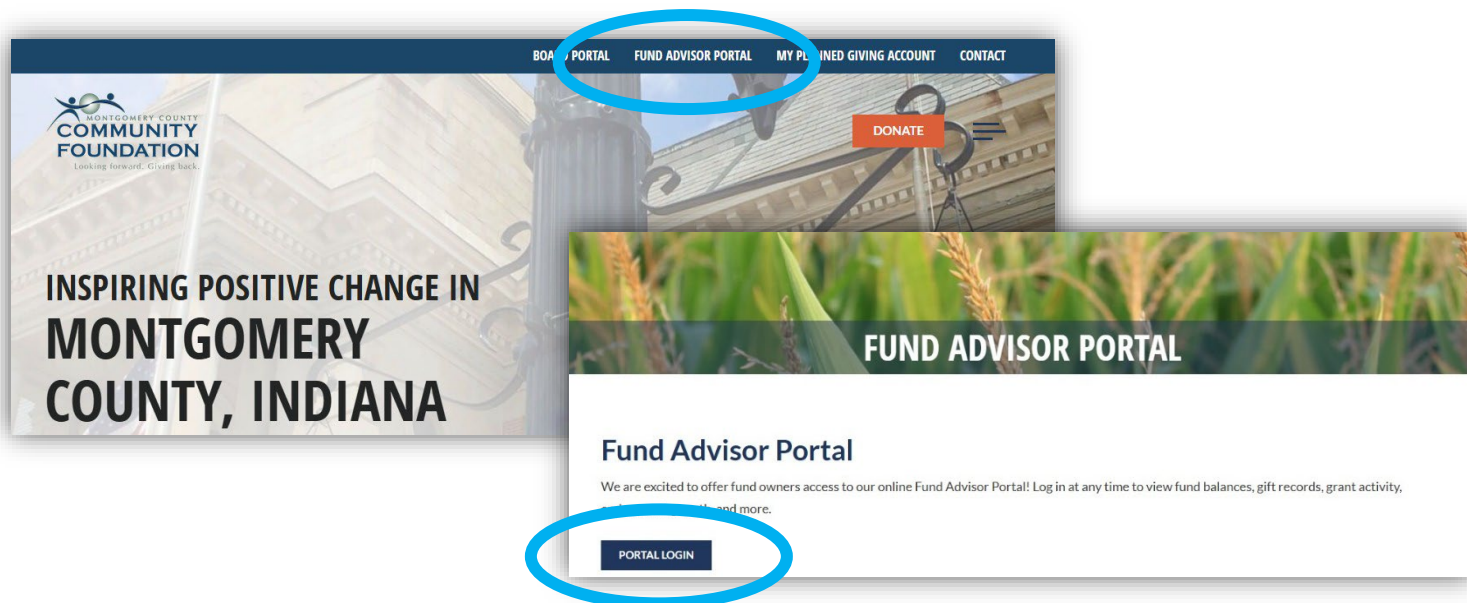
Getting Started

Fund advisors will receive an email (shown below) from the Montgomery County Community Foundation (IN) the **week of June 16th**. If you do not receive one, check your spam and junk folders. Click the link to access the main login page and create your password.

Important: If you do not have an email address on file at MCCF, or your email address has changed, please contact our office at 765-362-1267 to update your information.

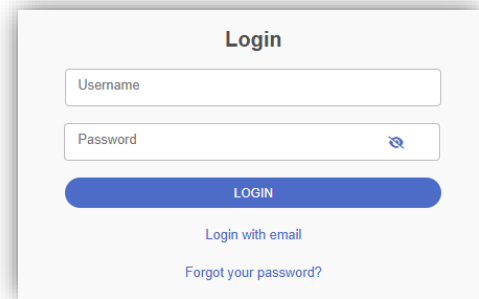


After the initial account setup, you can access the portal using the email link, or through the MCCF website. Visit www.mccf-in.org and click on “Fund Advisor Portal.” Once there, click “Portal Login” to be redirected to the portal homepage.

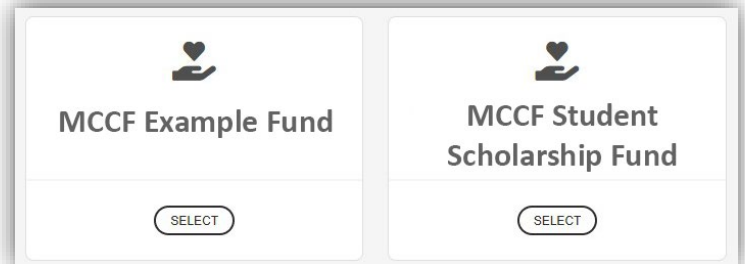


Login Options

- Fund advisors can also use “login with email.” This will send an automated email to your inbox with a pin number; when the pin number is entered, it will autofill your password.
- To reset login information, click “forgot your password?”
- If you have multiple funds, select the fund you would like to view first after logging in.



The login form is titled "Login". It contains two input fields: "Username" and "Password". Below the "Password" field is a blue "LOGIN" button. Underneath the button are two links: "Login with email" and "Forgot your password?".

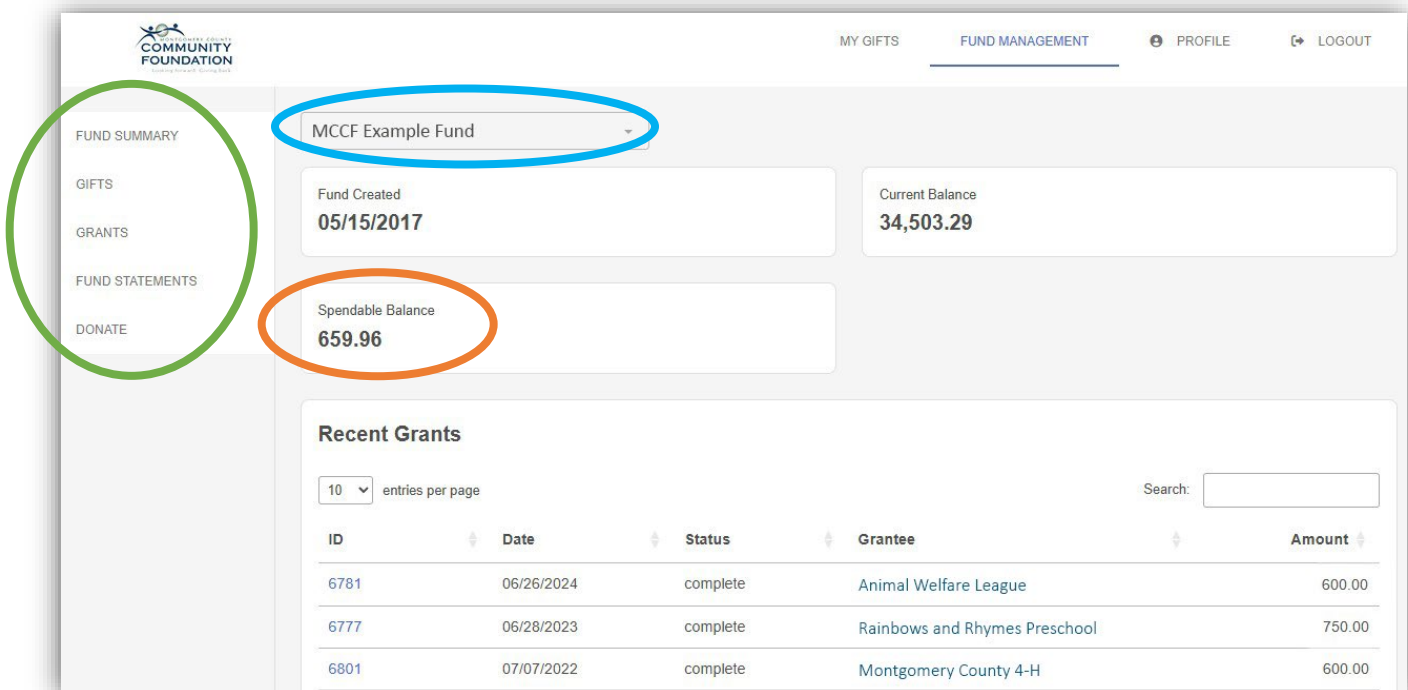


This section shows two fund selection cards. The first card is for "MCCF Example Fund" and the second is for "MCCF Student Scholarship Fund". Each card has a heart icon above the fund name and a "SELECT" button at the bottom.

Fund Summary

Once logged in, the portal will show a fund summary dashboard. This is a basic overview of fund activity, including the current balance, spendable balance, grants, and recent gifts.

- **Spendable balance** (orange) is the amount available to distribute as a grant or scholarship from the fund.
- If you have multiple funds, **click on the fund name** (blue) to switch to a different fund summary.
- Click on any category in the **navigation toolbar** (green) for more details in a specific area of fund activity.



The dashboard shows the "MCCF Example Fund" summary. The navigation toolbar on the left includes "FUND SUMMARY", "GIFTS", "GRANTS", "FUND STATEMENTS", and "DONATE". The main content area displays the fund name, creation date (05/15/2017), current balance (34,503.29), and spendable balance (659.96). Below this is a "Recent Grants" table with columns for ID, Date, Status, Grantee, and Amount.

ID	Date	Status	Grantee	Amount
6781	06/26/2024	complete	Animal Welfare League	600.00
6777	06/28/2023	complete	Rainbows and Rhymes Preschool	750.00
6801	07/07/2022	complete	Montgomery County 4-H	600.00

Navigation Toolbar

Gifts: Fund advisors can view donations to their fund but not the amount given. **Click on the donor name** (green) to view a donor’s contact information and giving history.

COMMUNITY FOUNDATION

MY GIFTS

FUND MANAGEMENT

PROFILE

LOGOUT

FUND SUMMARY

GIFTS

GRANTS

FUND STATEMENTS

DONATE

MCCF Example Fund

My Gifts

Donations

10 entries per page

Search:

ID	Date	Contributor	Type	Amount
31954	03/27/2025	Smith, John and Jane	Check	Hidden
30999	02/14/2025	Tester, Joseph P	Check	Hidden
29688	12/18/2024	Sample, Caroline A	Check	Hidden
29687	12/18/2024	Test Accounts, Inc.		

Contributor

Contributions

Name	Date	Amount	Description
Smith, John and Jane	03/27/2025		
Address	119 E Main Street		
	Crawfordsville, IN 47933		

Grants: The grants tab offers a brief summary of distributions from the fund and grantees. **Click on “grant history”** (green) for dates and other details.

COMMUNITY FOUNDATION

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DONATE

MCCF Example Fund

GRANT SUMMARY

GRANT HISTORY

RECURRING GRANTS

Grant Summary

10 entries per page

Search:

Grantee	Grants	Amount
Animal Welfare League	1	600.00
Rainbows and Rhymes Preschool	1	750.00
Montgomery County 4-H	1	600.00
Crawfordsville Main Street	1	650.00
Lew Wallace Preservation Society	1	600.00

Showing 1 to 5 of 5 entries

1

Fund Statements: Monthly and annual fund statements can be viewed or downloaded using this tab of the navigation toolbar. Click **“manual statement”** (green) to create a custom report using a specific date range.

COMMUNITY FOUNDATION

Looking forward. Giving back.

MY GIFTS

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GIFTS

GRANTS

FUND STATEMENTS

DONATE

MCCF Example Fund

FUND STATEMENTS

FILES

FINANCIALS

Statements

10 entries per page

Search:

Description	Date Range	
May 2025 Fund Statements	05/01/2025 - 05/31/2025	View
April 2025 Fund Statements	04/01/2025 - 04/30/2025	View
March 2025 Fund Statements	03/01/2025 - 03/31/2025	View

MANUAL STATEMENT

Manual Fund Statement

Statement Type

Monthly

Quarterly

Yearly

Custom Date Range

Start Date

Start Date

CREATE

Donate: Clicking this tab redirects users to the Online Giving Portal, where donors can conveniently make gifts to any MCCF fund using a credit or debit card.

COMMUNITY FOUNDATION

Looking forward. Giving back.

Online Giving Portal

Thank you for considering the Montgomery County Community Foundation as an option for your charitable giving.

Donors can select a specific fund using the search bar below, or browse all funds at MCCF by clicking the "show additional funds" button below.

For questions and additional help, please contact our office at 765-362-1267 or email sarah@mccf-in.org.

Search Funds

Other Tools

My Gifts: The “My Gifts” tab (blue) provides a summary of your own donations. Click on “donations” (green) for an itemized list and full gift history.

- Click “filter” (orange) to view gifts within a specific date range or “export” (purple) to generate an Excel document with all gift information.

Donation Summary

Fund

Cornerstone - Operating Fund

MCCF Building Fund

MCCF Example Fund

MCCF Community Scholarship Fund

Total

My Gifts

Donations

10 entries per page

Search:

ID	Date	Fund	Recurring	Anonymous	Type	Description	Amount
14601	05/16/2025	Cornerstone - Operating Fund					25.00
14602	03/23/2025	Building Fund					25.00
14603	06/10/2024	Cornerstone - Operating Fund					25.00

Profile: Update your personal information, username/password (security), and contact preferences at any time using the edit buttons (green); MCCF will be automatically notified of profile changes.

Profile

PERSONAL INFORMATION

SECURITY

CONTACT PREFERENCES

Name John Smith

Primary Address 119 E Main St
Crawfordsville, IN 47933

Email johnsmith@gmail.com

Phone Number 765-362-1267

Need Help?

If you have issues accessing the portal or questions about how it works, feel free to contact Sarah Storms at 765-362-1267 or sarah@mccf-in.org. If technology isn't your thing, we also invite fund advisors to bring their devices to the MCCF office and we will be happy to walk you through the setup process.

To do this, schedule an appointment with Sarah by calling our office at 765-362-1267. You can also scan the QR code or visit www.calendly.com/sarah-mccf-in to schedule online.

