Fund Advisor Portal
for Donor-Advised and Pass-Through Funds

MONTGOMERY COUNTY
# COMMUNITY FOUNDATION
Looking forward. Giving back.

Getting Started

Fund advisors will receive an email (shown below) from the Montgomery County Community Foundation (IN) to establish an account. 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.
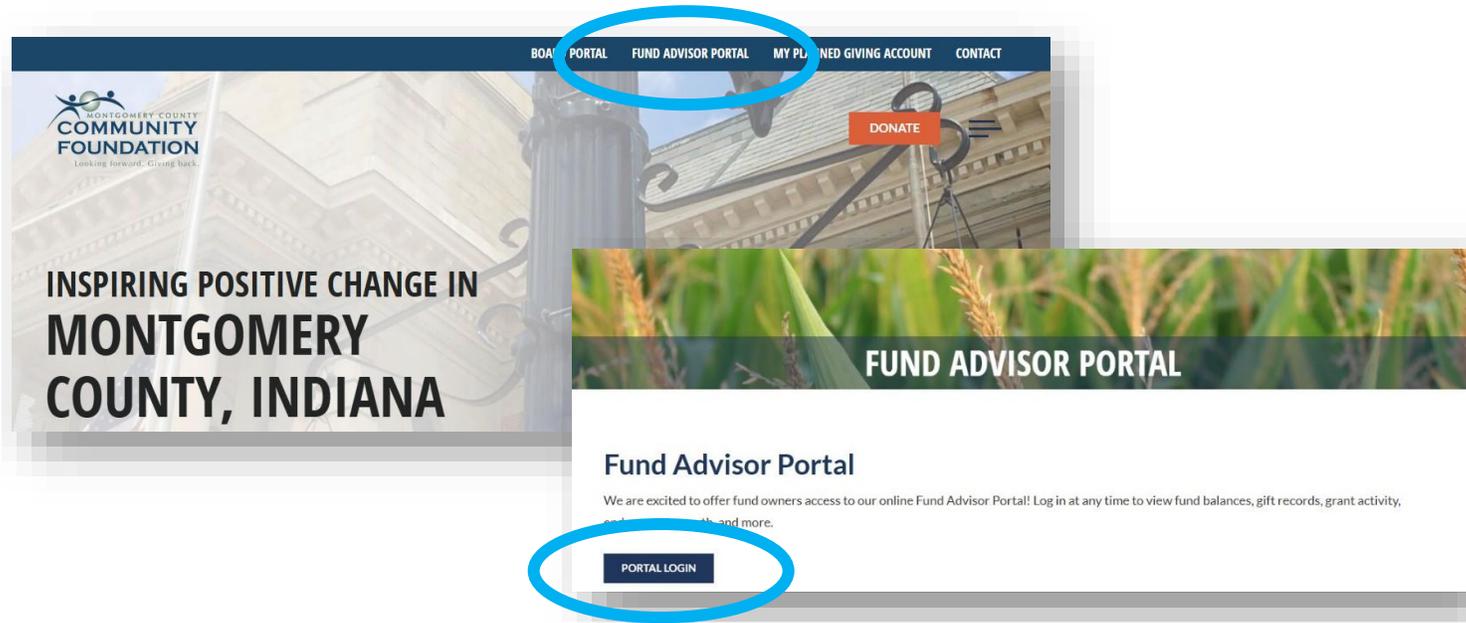
Login Options

- 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.
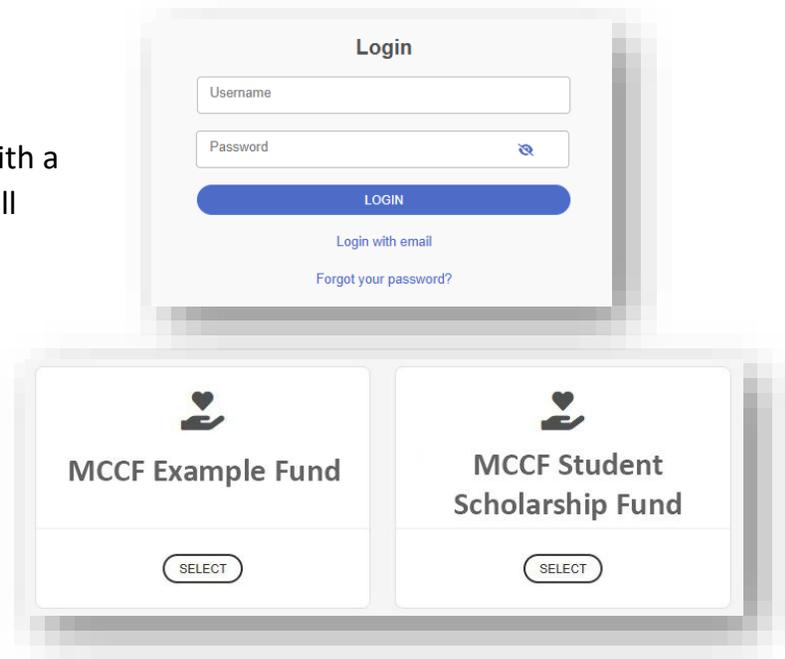
Fund Summary

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.
    - o *Note: Pass-through funds will not have a spendable balance, only a current balance*
- 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.
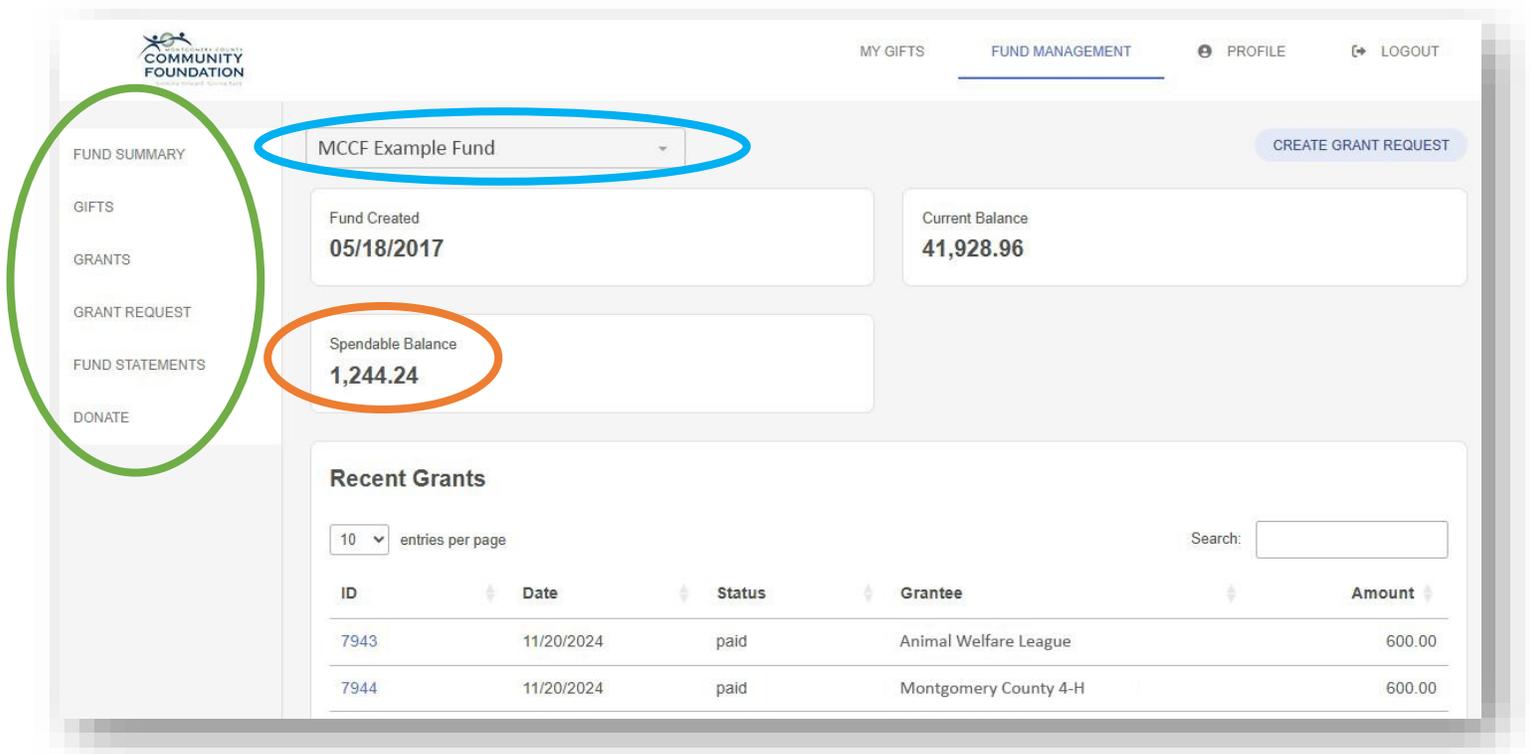
Navigation Toolbar

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.
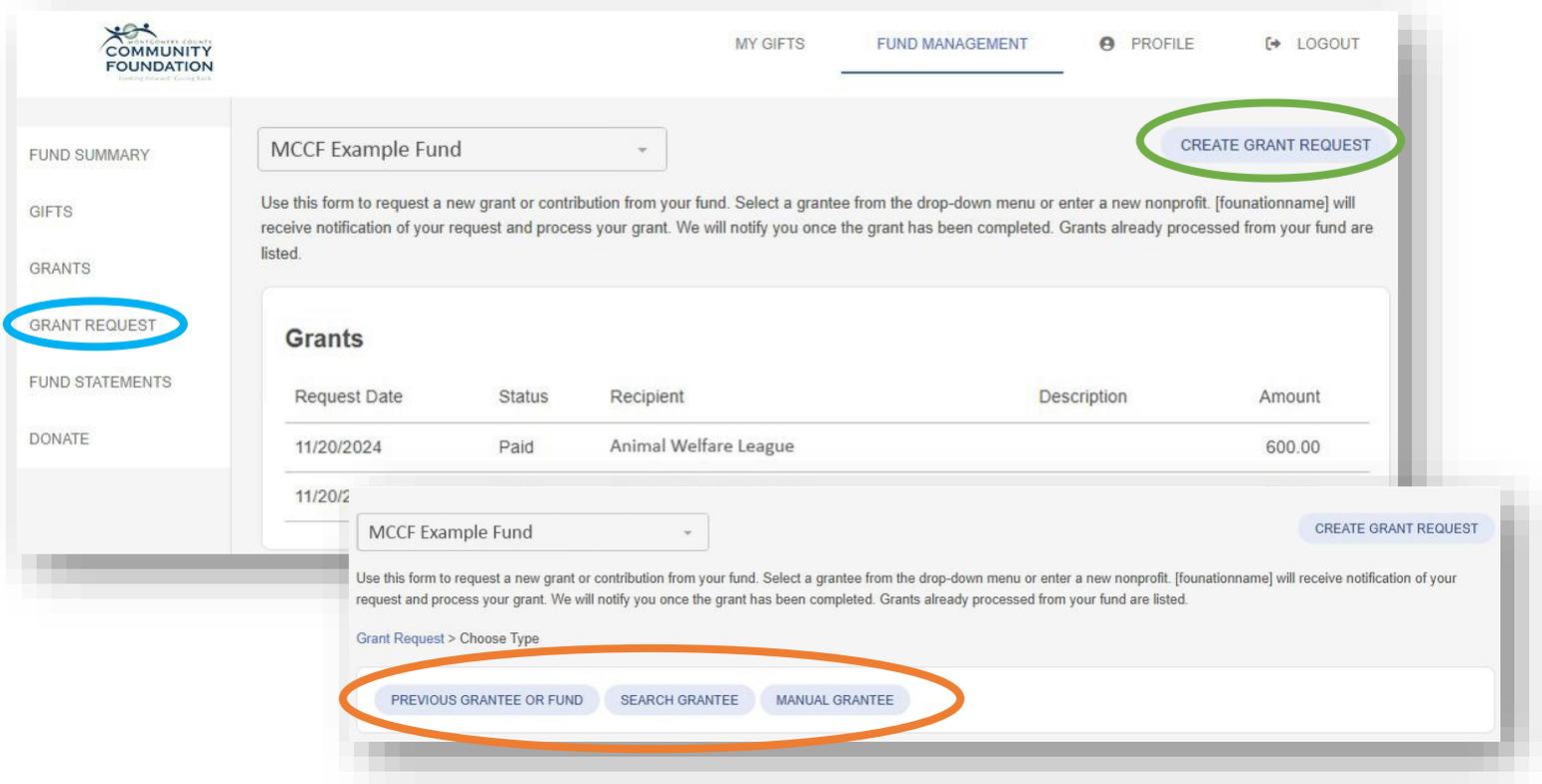

Grants: The grants tab offers a brief summary of distributions from the fund and grantees. **Click on "grant history"** (green) for dates and other details.

Submit a Grant Request:

Step 1: On the navigation toolbar, click the "Grant Request" tab (blue), then "Create Grant Request" (green). On the next page, select one of the three grant request options (orange).

Previous Grantee or Fund

Select from a list of organizations or MCCF funds granted to in the past.
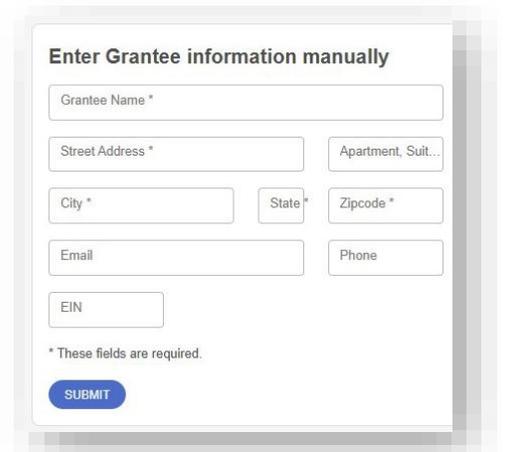

Search Grantee

Using keywords, location, or EIN number, fund advisors can search for a grantee within a list of organizations eligible to receive MCCF grants.

Manual Grantee*

If the organization you're looking for isn't listed, manually input the grantee information for your grant request.

* Manually added organizations must be located in or serve Montgomery County, Indiana.

Step 2: On the next page, fill in the requested information. Grant amounts can be determined using the spendable balance information on your fund summary page. Once complete, click "add to cart."

Review your grant request and edit if needed, then click "review grant requests" (blue) to be directed to the submission page.

Fund advisors can split their spendable balance and make multiple grant requests at one time. To do this, click "Create Grant Request" (orange) to repeat the process.

Step 3: If everything is correct on the final page, click "Submit Grant Requests" to send your selection(s)!

All requests are reviewed and approved by MCCF before being awarded.

Note: An error message will appear if the total amount requested is more than the spendable balance. If this occurs, use the back button in your browser to return to the summary page and edit your request(s).

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.

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.

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.

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.

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.