

Fund Advisor Portal

for Donor-Advised and Pass-Through Funds



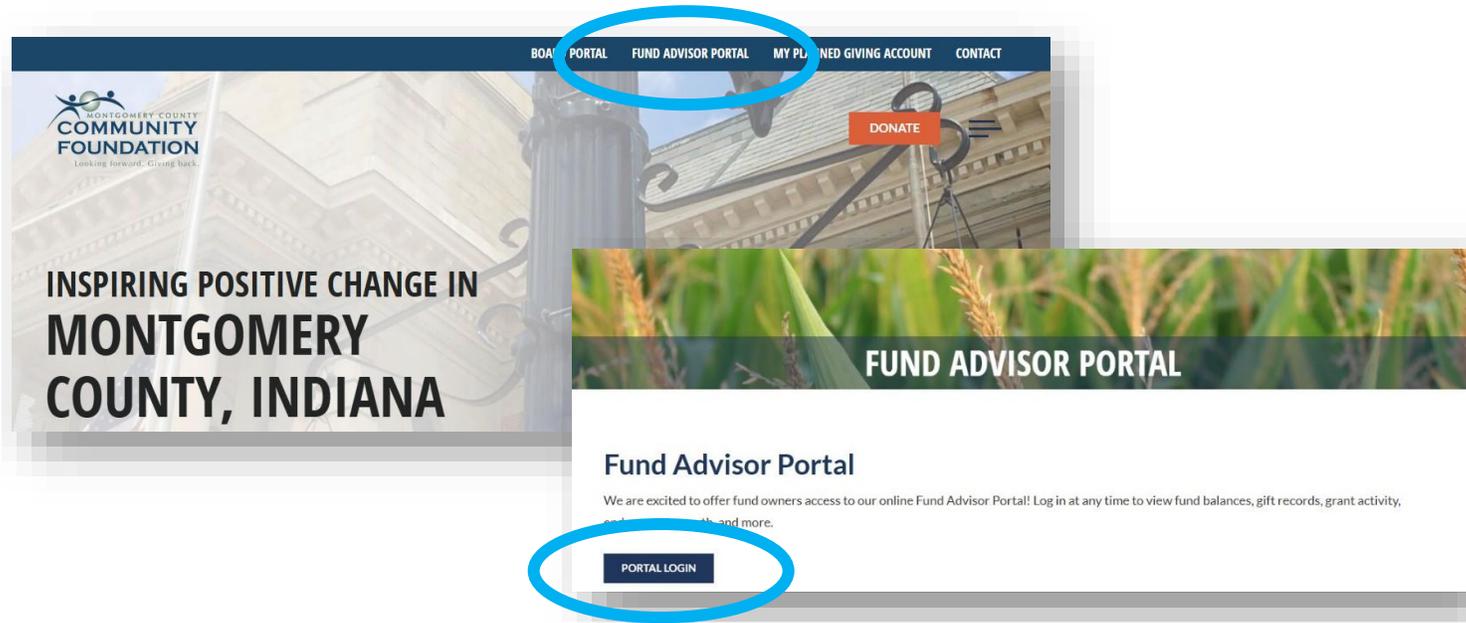
Getting Started

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.

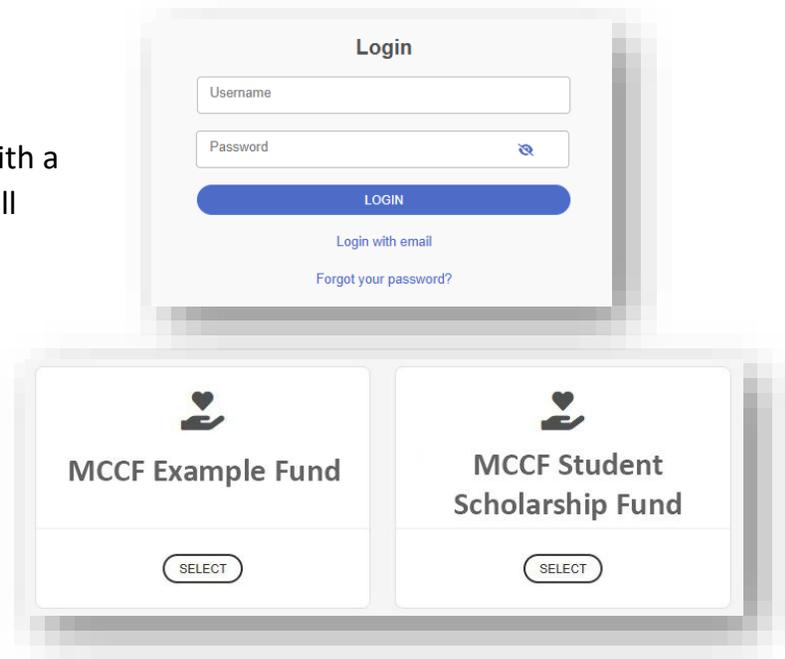


After the initial account setup, you can access the portal using the email link, or through the MCCF website. Visit www.mccf-in.org and click on "Fund Advisor Portal." Once there, click "Portal Login" to be redirected to the portal homepage.



Login Options

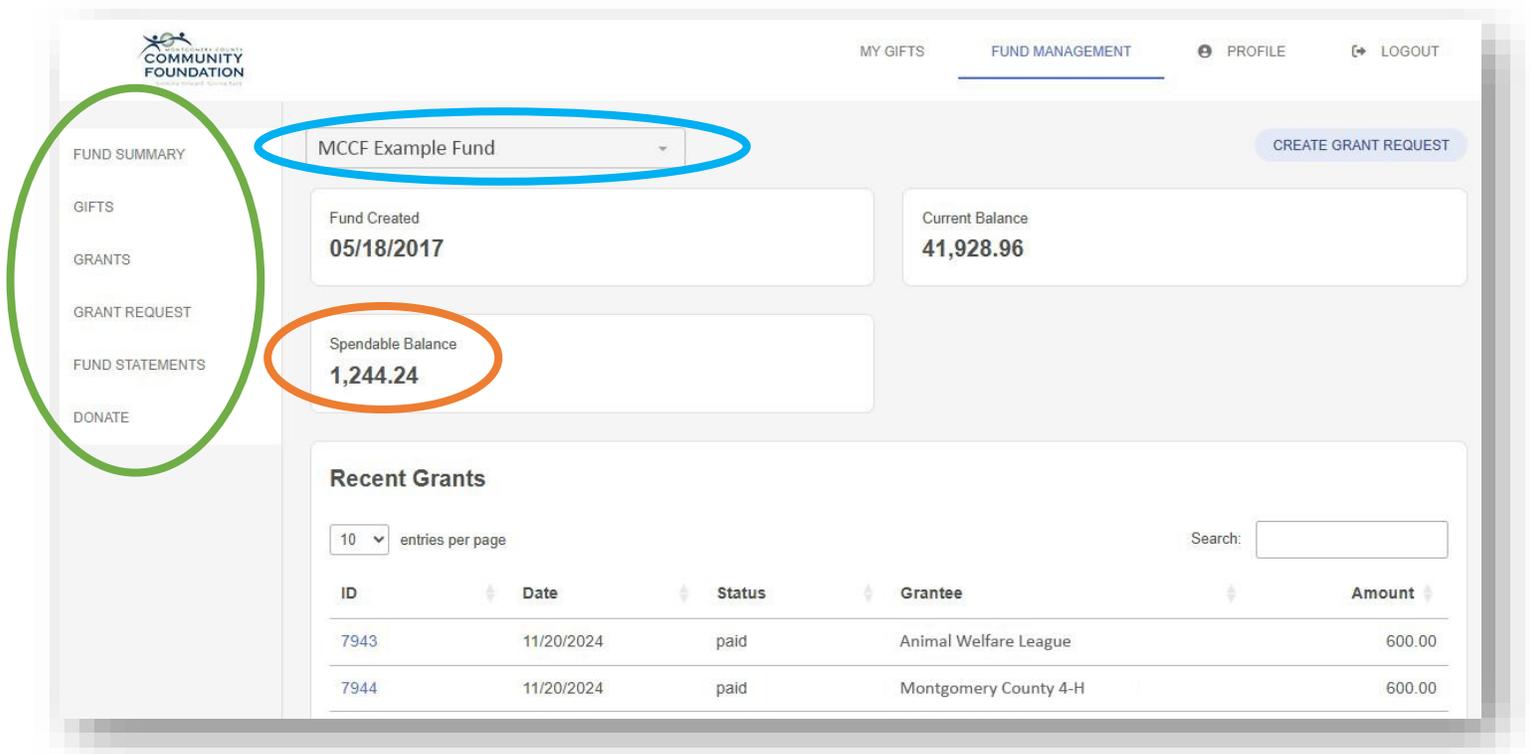
- Fund advisors can also use “login with email.” This will send an automated email to your inbox with a pin number; when the pin number is entered, it will autofill your password.
- To reset login information, click “forgot your password?”
- If you have multiple funds, select the fund you would like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

The screenshot displays the 'My Gifts' section for the 'MCCF Example Fund'. The left sidebar has 'GIFTS' highlighted. The main area shows a table of donations with columns for ID, Date, Contributor, Type, and Amount. The first row is circled in green. An inset window shows the donor's details:

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

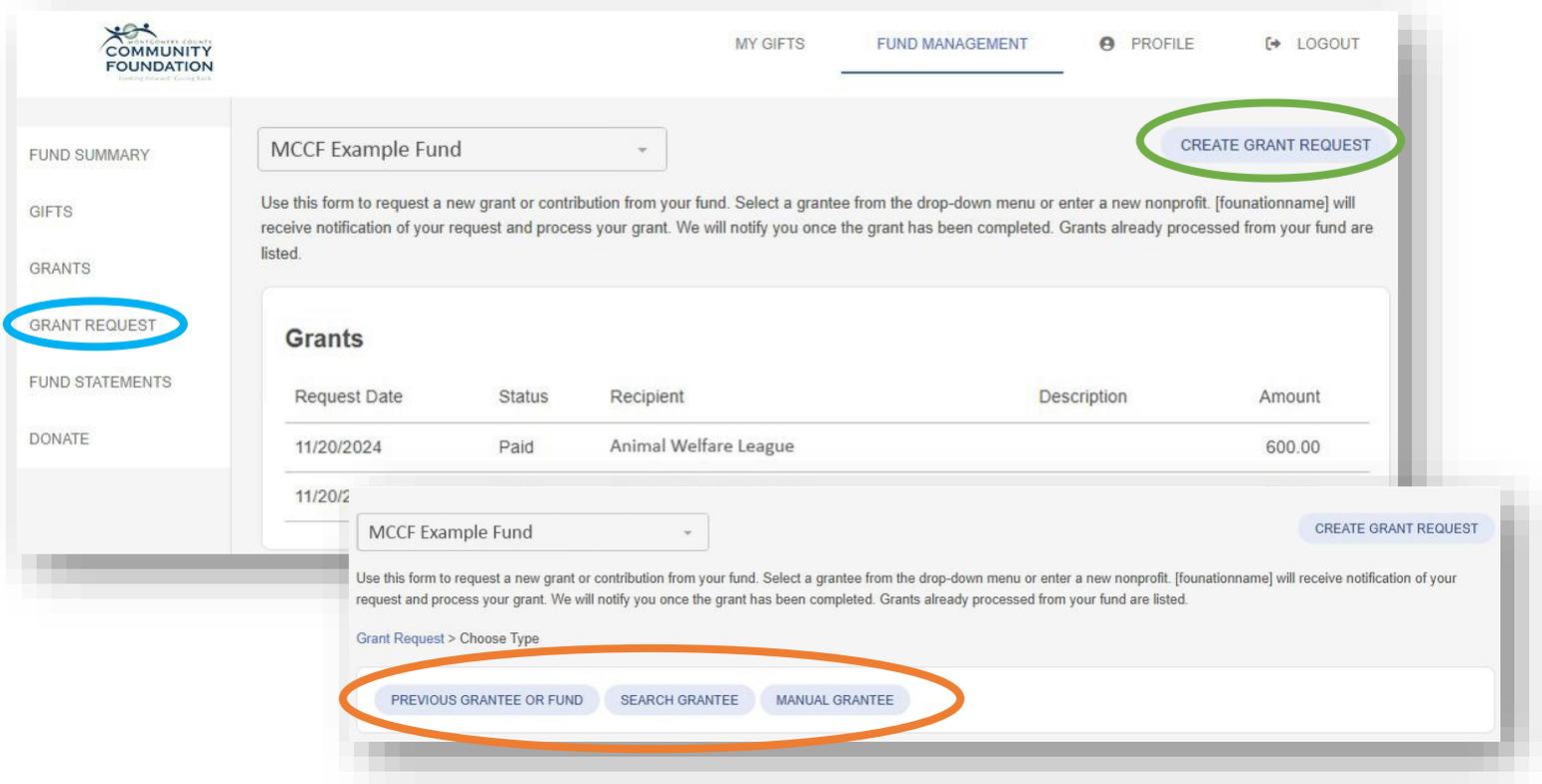
Grants: The grants tab offers a brief summary of distributions from the fund and grantees. **Click on "grant history"** (green) for dates and other details.

The screenshot displays the 'Grants' section for the 'MCCF Example Fund'. The left sidebar has 'GRANTS' highlighted. The main area shows the 'Grant Summary' section with a table of grant details:

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

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.



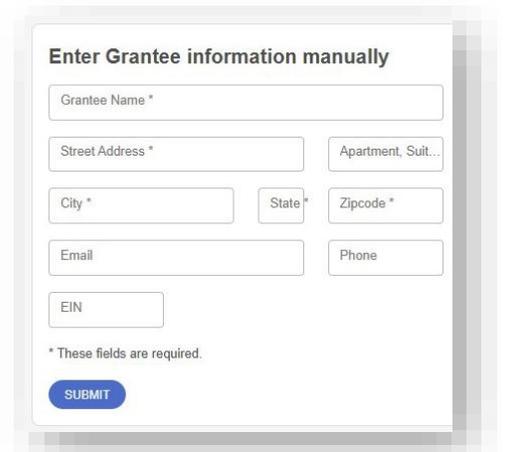
Search Grantee

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.

Grant Request

Grantee Animal Welfare League

Address 1104 Big 4 Arch Rd
Crawfordsville, IN 47933

Description Donor Advised Grant- MCCF Example Fund

38/255 characters

Amount 1,000.00

Anonymous

Recurring

Attachment No file chosen
(or drag and drop anywhere on the page)

Attachment Description

Additional Notes Please use for building upkeep and maintenance.

[ADD TO CART](#)

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.

MCCF Example Fund

[CREATE GRANT REQUEST](#)

CART (1)

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. [foundationname] will receive notification of your request and process your grant. We will notify you once the grant has been completed. Grants already processed from your fund are listed.

Grant Request Cart

[REVIEW GRANT REQUESTS](#)

	Recipient	Description	Attachment	Amount	
DELETE	Animal Welfare League 1104 Big 4 Arch Rd Crawfordsville, IN 47933	Donor Advised Grant- MCCF Example Fund		1,000.00	EDIT
Grant Request Total				1,000.00	

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.

MCCF Example Fund

[CREATE GRANT REQUEST](#)

CART (1)

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. [foundationname] will receive notification of your request and process your grant. We will notify you once the grant has been completed. Grants already processed from your fund are listed.

Grant Request Cart

Grantee	Description	Attachment	Amount	Anonymous
Animal Welfare League 1104 Big 4 Arch Rd Crawfordsville, IN 47933	Donor Advised Grant- MCCF Example Fund		\$ 1,000.00	No
Total			\$ 1,000.00	

[SUBMIT GRANT REQUESTS](#)

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.

The screenshot displays the MCCF Fund Management interface. On the left, a navigation sidebar includes 'FUND SUMMARY', 'GIFTS', 'GRANTS', 'FUND STATEMENTS' (highlighted with a blue circle), and 'DONATE'. The main content area shows the 'MCCF Example Fund' selected, with tabs for 'FUND STATEMENTS', 'FILES', and 'FINANCIALS'. The 'FUND STATEMENTS' tab is active, displaying a table of statements for May, April, and March 2025. A 'MANUAL STATEMENT' button (highlighted with a green circle) is located in the top right of the statements section. Below the table, a modal titled 'Manual Fund Statement' is open, featuring radio buttons for 'Monthly', 'Quarterly', 'Yearly', and 'Custom Date Range', a 'Start Date' input field, and a 'CREATE' button.

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.

The screenshot shows the 'Online Giving Portal' banner for the Montgomery County Community Foundation. The banner features the MCCF logo with the tagline 'Looking forward. Giving back.' and the text 'Online Giving Portal'. Below the banner, a message reads: '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.' A search bar labeled 'Search Funds' is provided at the bottom. Contact information is listed as 'For questions and additional help, please contact our office at 765-362-1267 or email sarah@mccf-in.org.'

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.

The screenshot displays the MCCF portal interface. At the top, the navigation menu includes 'MY GIFTS' (circled in blue), 'FUND MANAGEMENT', 'PROFILE', and 'LOGOUT'. The left sidebar contains 'DONATION SUMMARY', 'DONATIONS' (circled in green), 'PLEDGES', and 'RECURRING DONATIONS'. The main content area features a 'Donation Summary' section with three summary cards: 'Total Donations 200.00', 'Total Donations This Year 50.00', and 'Total Donations Last Year 75.00'. Below these is a table listing various funds. An inset window shows the 'My Gifts' page, which includes a 'Donations' table with columns for ID, Date, Fund, Recurring, Anonymous, Type, Description, and Amount. The table lists three donations. At the top right of the inset, 'FILTER' and 'EXPORT' buttons are circled in orange and purple respectively.

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.

The screenshot shows the 'Profile' page in the MCCF portal. The navigation menu at the top includes 'MY GIFTS', 'FUND MANAGEMENT', 'PROFILE' (circled in blue), and 'LOGOUT'. The left sidebar lists 'PERSONAL INFORMATION', 'SECURITY', and 'CONTACT PREFERENCES'. The main content area displays the user's profile information: Name John Smith, Primary Address 119 E Main St, Crawfordsville, IN 47933, Email johnsmith@gmail.com, and Phone Number 765-362-1267. An 'EDIT INFORMATION' button (circled in green) is located at the top right of the profile details.

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.

