QUICK REFERENCE

Requesting a Grant from Your Fund in Fund Holder Portal

Requesting grants from your donor advised fund at CFNS is easy! The fund holder portal gives you one-stop-shop access to your fund's historic grants and an easy to complete form to submit new grant requests.

Please note, to access the Grant Request form you must login to your Fund Holder Portal account. If you are new to the Portal too, check out these step-by-step instructions HERE.

As always, our staff is ready to answer any questions you might have. If you'd like assistance with the portal, please contact us: info@cfnorthstate.org or 530-244-1219.

Please note, this option is only enabled for select funds. If you do not see the Grant Request tab in your portal email us for assistance at info@cfnorthstate.org.

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TO BEGIN

Login to your Fund Holder Portal account and click on the Grant Request tab.

| Home | Contributions | Grants | Grant Request | Statements | Files | Logout |

CHOOSE A GRANTEE

You can select past grantees, foundation funds, search the system for eligible grantees by name, or enter new grantee details manually.

CHOOSE GRANTEE FROM LIST
- Grantees you have given to in the past - Lists grantees that have previously received donations from the fund advisor.
- Foundation funds you have given to in the past - Lists foundation funds that have previously received donations from the fund advisor.
- Other foundation funds - Lists funds/programs that are setup to receive donations.

Choose from previous Grantee

Grantees you have given to in the past

Yosemite Foundation

Foundation funds you have given to in the past

Other foundation funds

SEARCH FOR OTHER GRANTEES

- Enter keyword details for the nonprofit you would like to fund. Not all fields need to be filled out. A list of potential grantees will populate based on the search results.

Search for other Grantees

Name	Help for Homeless Pets
City	Dallas
State	TX **Search**

ENTER GRANTEE INFORMATION MANUALLY

- If you prefer, you can manually enter all grantee details. Be sure to include all required fields to help expedite your grant request.

Enter Grantee information manually

Name *	
Address *	
City*	

GRANT FORM COMPLETION

After you either select an existing grantee or submit information for a new one, the grant request form becomes available.

Description - Provide a brief description of this grant's purpose (ex. General operating support).

Amount - Enter the grant amount (grant amount minimum is $250 per grant).

Anonymous *(optional)* **-** Check this box if the grant is being given anonymously, meaning the *fund name* is not visible to the recipient. Your name as a fund advisor is always kept private.

Recurring – Recurring grants are not supported in the system, please ignore this checkbox.

Attachment *(optional)* **-** Attach supporting documentation by browsing to the file or by dragging and dropping the file on the page (ex. Event sponsorship form).

Attachment Description *(optional)* **-** Enter details about the attached documentation.

Notes to Foundation Staff *(optional)* – If you are working with a specific contact at an organization provide their name and email here.
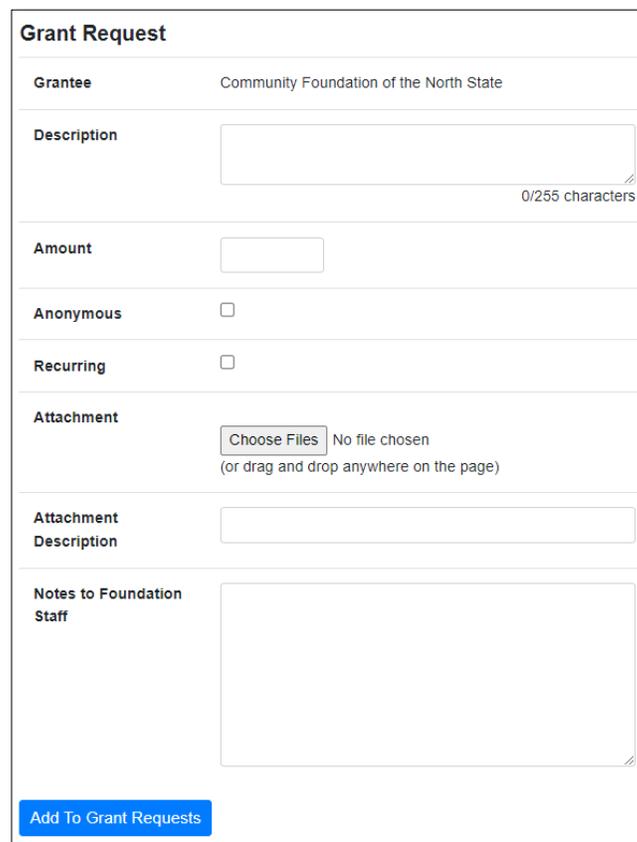
Grant Request	
Grantee	Community Foundation of the North State
Description	
	0/255 characters
Amount	
Anonymous	☐
Recurring	☐
Attachment	Choose Files No file chosen (or drag and drop anywhere on the page)
Attachment Description	
Notes to Foundation Staff	
Add To Grant Requests	

Click the blue "Add To Grant Requests" button when complete. **Then repeat the process if you have additional grants to recommend.**

GRANT REQUEST REVIEW & SUBMISSION

As you add new requests, they are listed within Grant Requests. You can delete and edit if necessary.

To submit your grant requests to the Community Foundation, click the blue "Review" button.

Grant Requests

	Recipient	Description	Amount	
Delete	Community Foundation of the North State	To support example grant program.	500.00	Edit
Delete	CREF	Funding for another grant example program	750.00	Edit
		Grant Request Total	1,250.00	Review

On the final confirmation page, review grant requests, read the authorization statement, and click the blue "Submit Requests" button.

Review Grant Requests

Grantee	Description	Amount	Anonymous
Community Foundation of the North State	To support example grant program. Notes to Foundation Staff:	$ 500.00	No
CREF	Funding for another grant example program Notes to Foundation Staff:	$ 750.00	No
	Total	$ 1,250.00	

By clicking "Submit Requests" I attest that the grant recommendation does not represent payment of a pledge or other personal financial obligation on behalf of the fund representative(s), family member(s), or businesses we control; and that no tangible benefit, goods or services, such as membership, dinners, tickets, advertisements, etc. were or will be received by any individual or entity connected with the Fund; and donors, advisors or related parties are not receiving grants, loans, compensation or similar payments from donor advised funds.

Submit Requests

Submitted grant requests will display in the grant history of your portal.

Grants

⇅ Date	⇅ Status ▼	⇅ Recipient	⇅ Description	⇅ Amount	⇅
07/31/2023	Request	CREF	Funding for another grant example program	750.00	Cancel
07/31/2023	Request	Community Foundation of the North State	To support example grant program.	500.00	Cancel