

# RECOMMEND A GRANT QUICK GUIDE

## DESCRIPTIONS

### GET STARTED

Access the grant recommendation screen through the quick link or main navigation.

### SELECT GRANT ADVISOR

Select the listed grant advisor for the account who will be recognized as the individual recommending the grant.

### SELECT GRANT RECIPIENT

Choose from your favorite charities, manually enter the information or search GuideStar when selecting your grant recipient.

### ENTER THE GRANT AMOUNT

Be sure you meet the minimum indicated to the right of the box.

### GRANT TIMING

Process your grant immediately, on a future date or create a recurring grant schedule.

### RECOGNITION

DFX allows you to choose how you are recognized for your grant. Issue it in the name of your fund, the primary donors or a special recognition in honor of someone. Grants also can be issued anonymously.

The screenshot shows the 'Recommend a Grant' web form. At the top right, the account value is \$83,558.81. The navigation bar includes 'Account Details', 'Contributions', 'Grants', 'Investments', 'Forms', and 'Statements'. The 'Grants' section is active. Below the navigation bar, there is a search bar for 'Recommend a Grant for' and a 'Back to Previous Page' button. A progress indicator shows three steps: 1. GRANT DETAILS (active), 2. PREVIEW, and 3. SUBMITTED. The form is divided into several sections:

- SELECT THE GRANT ADVISOR:** Includes a note 'Fields marked with \* are required.' and a question 'Who is the grant advisor? \*' with radio buttons for 'Mrs.' and 'Mr.'.
- SELECT THE GRANT RECIPIENT:** Includes a question 'Who is the grant recipient? \*' and three buttons: 'Previously approved grant recipients', 'Search approved grant recipients', and 'Search GuideStar'. A 'Manually enter grant recipient' button is also present.
- SELECT THE GRANT RECIPIENT (Form):** Includes a checkbox 'Save this as a Favorite Charity' and fields for Name, EIN, Contact Name, Contact Phone, Address 1, Address 2, City, State (dropdown), and Zip.
- ENTER THE GRANT AMOUNT:** Includes a question 'What amount would you like to give? \*' with a text input field containing '\$250.00' and a note 'Minimum amount: \$250.00'. It also has radio buttons for 'Grant Amount' and 'Account Closing Grant'.
- SELECT THE GRANT TIMING:** Includes a question 'What type of grant would you like to recommend? \*' and radio buttons for 'One time grant to be processed immediately', 'One time grant to be processed on a future date', 'A recurring grant', and 'Installment grant (multi-year grant commitment)'.
- SELECT THE GRANT RECOGNITION:** Includes a question 'How do you want to be recognized? \*' and a checkbox 'Include the following:'. Below this are options for 'Name of the Account', 'Special recognition' (with a dropdown and text input), and 'Recommended by' (with a dropdown and text input).

At the bottom of the form, there is a checkbox 'Issue the grant anonymously'.

Issue the grant anonymously

# RECOMMEND A GRANT

## QUICK GUIDE

### DESCRIPTIONS

#### GRANT PURPOSE

Would you like the funds to be restricted to a specific purpose? You can do so by entering it here.

#### ACKNOWLEDGEMENT & NEXT

Read and acknowledge the terms for the grant. Clicking Next confirms your recommendation is complete and ready to be processed.

#### PROCESS STATUS

If your grant recommendation processes successfully and clears approvals, you will see a green bar indicating it is ready to submit.

#### QUICK EDITS

Edit the amount of your grant, grant recipient, the timing, recognition and purpose by clicking the pencil icon.

#### ADD ANOTHER GRANT

Choosing the Add Another Grant button allows you to recommend additional grants in one transaction.

#### SUBMIT

When ready, submit all grants for processing.

#### SUCCESS & STATUS

After grants are submitted, a third and final screen confirms they are submitted and in process.

The status bar reflects the total number of grants currently submitted for processing. This number includes all grants submitted to date that are not yet processed.

#### GRANT PURPOSE

Does this grant have a special purpose?\*

- The grant purpose is unrestricted
- There is a special grant purpose:

Special instructions not to appear on the letter:

#### ACKNOWLEDGEMENTS AND SUBMISSION

I have read and agree to the terms below:\*

- I affirm that all information in this form is true to the best of my knowledge, and that neither I nor my family will benefit in any way from this grant.
- I affirm that the grant does not fulfill a pre-existing binding pledge to the recommended charitable organization, unless otherwise disclosed within this grant submission.
- I understand that this information represents a grant recommendation that I am making to the sponsor of my account and not a final grant decision.
- I affirm that neither I nor any related party control the governing board of any supported organization in the case of a grant to a supporting organization.

Preview >>

#### Preliminary Grants for

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GRANT DETAILS

PREVIEW

SUBMITTED



Almost finished! Please review the grant recommendation information below prior to submission.

Key: ✎ = Edit \* = Cancel 🔍 = View

\* = Edit can only be completed by the person that made the recommendation.

Deselect All

Select All

USER	RECIPIENT	AMOUNT	TIMING	RECOGNITION	PURPOSE	
Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	
	National Fire Safety Council ATTN: Ralph Larsen 212 Park Avenue Sanford, NC 27330	\$250.00	One time grant		Unrestricted	

Cancel Selected

Submit Selected

Add Another Grant

There is 1 preliminary grant currently waiting for submittal.

GRANT DETAILS

PREVIEW

SUBMITTED



There is 1 grant currently submitted for processing.