



WHAT IS DONORCONNECT?

DonorConnect is the password-protected part of CCF's Web site that allows you to manage your philanthropy online. This convenient platform helps you perform a variety of tasks designed to make your giving easier and more effective.

WHO SHOULD CONSIDER USING DONORCONNECT?

All donors who wish to go paperless in their grants transactions and simplify the management of their philanthropic activities.

WHAT ARE THE BENEFITS OF DONORCONNECT?

- Make your grant recommendations online and help to protect our environment
- Access information 24/7
- Check fund balances
- View recent fund activity, including contributions, grants, etc.
- Submit one or more grant recommendations without having to log in multiple times
- Register for events
- Use one login/password to manage multiple funds through one account
- Learn about CCF donors, advisors, events and initiatives in the latest newsletter or other publications

at a glance

DonorConnect

- Manage and simplify your philanthropy online with CCF's password-protected Web platform
- Check fund balances, view recent fund activity, submit one more grant recommendations and more
- Get CCF's quarterly e-newsletter and the latest in philanthropic news

HOW DOES DONORCONNECT WORK?

- 1 Get a DonorConnect account** – When establishing a fund, each donor will receive a username and password for DonorConnect. Donors can change their login information at any time.
- 2 Log in** – Donors use their login information to access the DonorConnect platform.
- 3 Manage fund** – Donors manage their funds online at their convenience.

CONSIDERATIONS

DonorConnect is run on a secure network. For technical support, please contact Donor Relations at (213) 239-2300 or donorrelations@calfund.org.

Grant recommendations submitted through DonorConnect are not processed in real time – the CCF team may take four to six business days or longer to conduct proper due diligence and fully review each grant.

donorconnect in action

A local financial advisor had recommended CCF to a number of clients who made inquiries about charitable giving.

In his role as a financial advisor, he was often asked to send grants to various nonprofit organizations from his clients' Donor Advised Funds. Through DonorConnect he regularly logs in to his clients' accounts (in accordance with their wishes) where he can check their account balances, recommend grants and even make account updates, all on behalf of his clients.

To sign up for **DonorConnect**, contact your Relationship Manager or a Grants Specialist at (213) 239-2320 or info@calfund.org.

IMPORTANT LEGAL DISCLOSURE

The information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal or tax advice.

The California Community Foundation does not provide legal or tax advice. You should consult your tax advisor to properly determine the tax consequences of making a charitable gift to the California Community Foundation.

Contributions to the California Community Foundation represent irrevocable gifts subject to the legal and fiduciary control of the foundation's board of directors.

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