THE CHICAGO COMMUNITY TRUST®

Donor Portal – Frequently Asked Questions

GENERAL INFORMATION

Question: How do I access the Donor Portal?

Answer: From cct.org you can access a link to the Donor Portal from the menu found in the upper right corner. If you are accessing cct.org on your mobile device, the link to the Donor Portal can be found under the menu located in the upper right corner of your screen. Once you select **Donor Portal** you will be directed to a log-in page.

The Donor Portal can also be accessed directly HERE. We recommend bookmarking this link.

Question: How do I reset my password?

Answer: From the left navigation menu, go to "Change Password" and follow the instructions on the page. Passwords must be at least **8 characters long** and must have one **uppercase character**, one **lowercase character**, one **special character,** and one **number**.

Question: What if I didn't receive the email notification to reset my password?

Answer: Check your spam folder for the email address associated with the account. If you cannot find it or are unsure of the email address associated with your account, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: What browser is best to access the Donor Portal?

Answer: For the best user experience, we recommend downloading the latest version of Google Chrome.

Question: How do I contact my Philanthropic Advisor?

Answer: Once logged into the Portal, you can find your Philanthropic Advisor's contact information on the dashboard, below the fund overview. If you are having trouble accessing the Portal to retrieve this information, or the information is missing, please email DonorServices@cct.org.

MANAGING MY ACCOUNT

Question: Where is my fund statement?

Answer: From the left navigation menu, go to **Fund Documents** and once the new window opens, select **Fund Statements from the center drop-down menu. Click the magnifying glass icon to search**. If you are missing any data or have questions, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: Where can I find my DAF Agreement or Fund Application?

Answer: From the left navigation menu, go to **Fund Documents** and once the new window opens, select **Fund Agreement/Amendments**. Click the magnifying glass icon to search. If you are missing any documents or have questions, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: Where can I see all the people who have grant making privileges on the DAF? How can I update, add, or remove advisors?

Answer: From the left navigation menu, select **Fund Advisors**. In the window that opens, a list of the advisors and their relationship to the fund will be shown. If you have questions or would like to change the advisors on your fund, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: How can I update my contact information on my fund?

Answer: If you would like to change your contact information, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: How can I review the succession plan or post-death beneficiary on my fund?

Answer: Your succession plan will likely be outlined in your **Fund Agreement**. To access your agreement, from the left navigation menu, go to **Fund Documents**. Once the new window opens, select **Fund Agreement/Amendments**. Click the magnifying glass icon to search. If you have questions or would like to update your plan, please contact your Philanthropic Advisor or email DonorServices@cct.org.

MAKING A GRANT RECOMMENDATION

Question: How does an advisor recommend grants from a donor advised fund?

Answer: Whenever possible, a donor should submit their grant recommendation online through the Donor Portal. From the left navigation, go to **Recommend a Grant** and provide the grant details in the form accordingly. Once completed, select **Add to Grant Basket** to review information and either submit or save for later.

If you need assistance in submitting a grant recommendation, please contact your Philanthropic Advisor or email DonorServices@cct.org. Be advised that the grant approval process and issuance of funds to the grant recipient may take up to 14 business days from receipt.

Question: Will I receive an acknowledgement for my grant recommendations?

Answer: Email notices are sent when grant recommendations are submitted and the grants are paid. You may also see the status of your pending grant recommendations and paid grants from the **Dashboard**.

Question: Can I make an anonymous grant from my donor advised fund?

Answer: Yes. This is an advantage of using a donor advised fund. To make your grant anonymously, check "I wish to remain anonymous" from the **Grant Recommendation Form**.

Question: Can I make a grant from my donor advised fund in honor or in memory of someone?

Answer: Yes. When completing the grant recommendation form, select "In Honor of" or "In Memory of" from the dropdown under **Grant Dedication**. Once selected, enter the details in the **Grant Dedication Field**. If you would like the

grant recipient to send an acknowledgement of this honorary/memorial grant, select "Send an acknowledgement" and enter the recipient's contact information in the field provided.

Question: How long does it take for a check to be mailed?

Answer: The Chicago Community Trust reviews and approves grant recommendations twice per week. Checks are then mailed to the charitable grant recipient within five and seven business days. Please note that the timeline above is a typical timeline that may be impacted by events such as office closures, holidays, or unforeseen circumstances.

Question: How do I see all my grant activity in the Donor Portal?

Answer: From the Dashboard, select **Grant History** to access a full list of grants paid from your fund. If you are missing any data or have questions, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: How can I make a grant recommendation to a new nonprofit organization?

Answer: In the organization name field enter the organization's name then click enter. If the organization you typed in doesn't exist, select Search on GuideStar. Type in the new organization, click search and select the organization you want to populate the form. If you don't see the organization in the list, then select the plus symbol to add the organization's information.

Question: Are there limitations or policies that limit recurring grant recommendations?

Answer: While you may create a recurring grant from your fund at any time, grants will not be processed, and payments will not be paid if the grant amount is in excess of the available spendable balance.

Question: I previously made a grant to an organization that is now not showing up when I try to enter it into the grant recommendation form.

Answer: There are many reasons why an organization may not appear when entering it directly into the grant recommendation form, such as the organization has changed its name or it is no longer a 501c3 in good standing recognized by the IRS. If you need assistance in submitting a grant recommendation, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: How do I cancel or change a submitted grant?

Answer: Once a grant has been submitted in the Donor Portal, it cannot be edited. For changes to submitted grants, please email your Philanthropic Advisor or DonorServices@cct.org. You may also cancel the grant submission and resubmit it according to your preferences.

Question: How do I see future recurring grants I've scheduled?

Answer: From the left navigation menu, go to **Recurring Grants**. From the window that opens, you will be able to see all your Active, Canceled, and Completed recurring grants. You will also be able to see the next grant scheduled, the prior or most recent grant issued date, the total and remaining occurrences.

Question: How do I find and edit/update or cancel a recurring grant?

Answer: You cannot edit a recurring grant, only cancel it and re-issue it. To modify an existing recurring grant, such as amount or frequency, please contact your Philanthropic Advisor or email DonorServices@cct.org.

MAKING A CONTRIBUTION

Question: How can I make a contribution to my DAF?

Answer: The Chicago Community Trust is able to receive marketable securities, wire or ACH transfers, and contributions made by check or credit card. For instructions on making a contribution, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: Will I receive a receipt for my contributions?

Answer: Yes. The Chicago Community Trust will provide you with a written confirmation of your contribution(s). This confirmation serves as a receipt for your taxes and any charitable deduction you may claim for your contribution(s). To view or download your tax receipt go to **Fund Documents** from the left navigation menu and select **Tax Acknowledgements**. Click the magnifying glass icon to search. Please note, the Foundation does not issue tax receipts for transfers from existing donor advised fund accounts, and credit card contributions will receive an email receipt

Question: How long does it take for my contribution to show as invested in my account?

Answer: The time it takes for a contribution to appear in a donor advised fund account depends on the type of asset contributed. Cash contributions will post within two to three business days. Publicly traded securities will be sold and reinvested and will appear within one week of receipt. Complex assets will take longer.

Question: How do I see all my gift activity in the Donor Portal?

Answer: On the dashboard, select **Gift History** to access a full list of your contributions to your fund. If you are missing any data or have questions, or are looking for information about a gift to the Trust not directed to your fund, please contact your Philanthropic Advisor or email DonorServices@cct.org.

Question: How do I interface gift history and grant history with my preferred accounting software or financial tracking software?

Answer: For security reasons, our Donor Portal cannot be connected to any external software. You can however export CSV and chart-format gift history and grant history reports anytime. From the **Dashboard**, select either **Gift History** to access a full list of your contributions or **Grant History** to access a full list of the grants you have recommended. Once a new window opens, select the CSV button. If you are missing any data or have questions, please contact your Philanthropic Advisor or email DonorServices@cct.org.