Ren

Giving Platform Donor User Guide

In this guide, you'll find everything you need to manage your DAF account with confidence.

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Homepage Overview

Quick Links

Links are available for the most common actions; recommending a grant, planning a contribution

Account Details

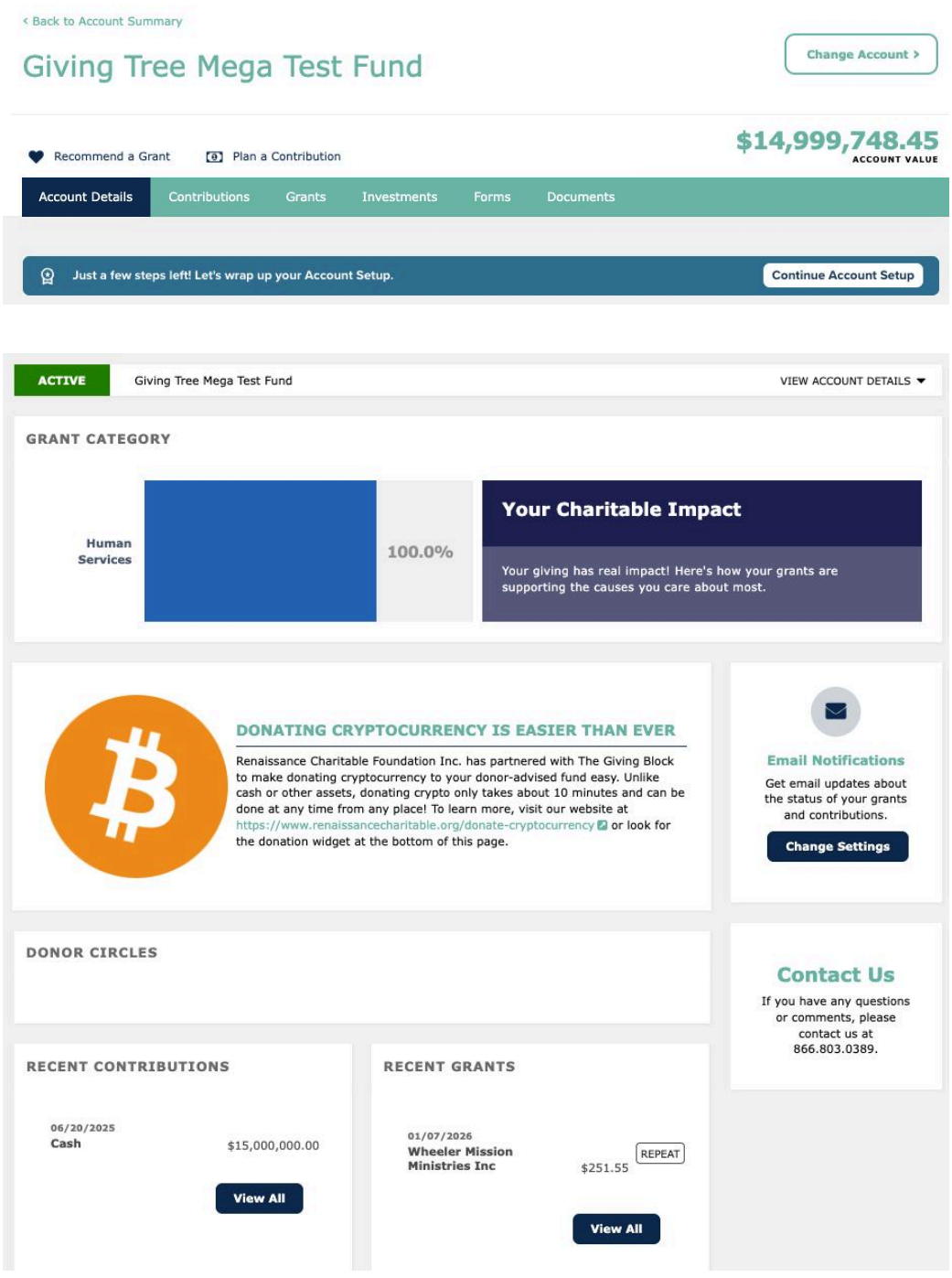
Click to expand for full details on the account

Charitable Impact

Showcases your impact of giving by breaking grants into philanthropic categories.

Recent Transaction

Listed are the three most recent contributions and grants for a fund. Click on any transaction for more details.

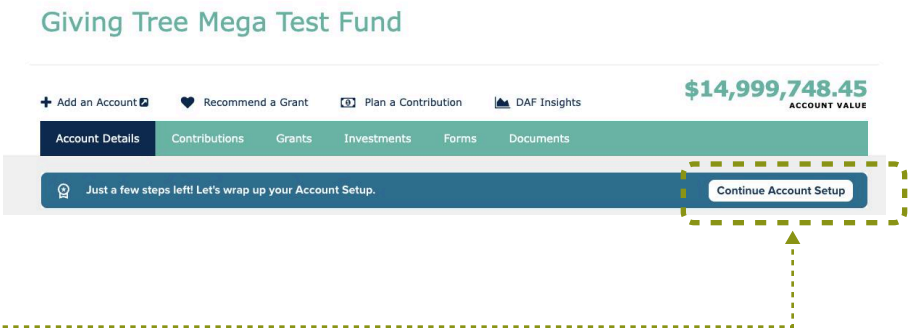


Finish Account Set Up

After the application is signed, there are still outstanding details we need to ensure your account is in good standing.

Open Account Setup

On the homepage, a blue banner will appear below the menu bar if you haven't confirmed the Account Name, entered the Charitable Purpose, or added the Charitable Succession Plan. Select the **Continue Account Setup** button. This banner will disappear once all information has been entered.

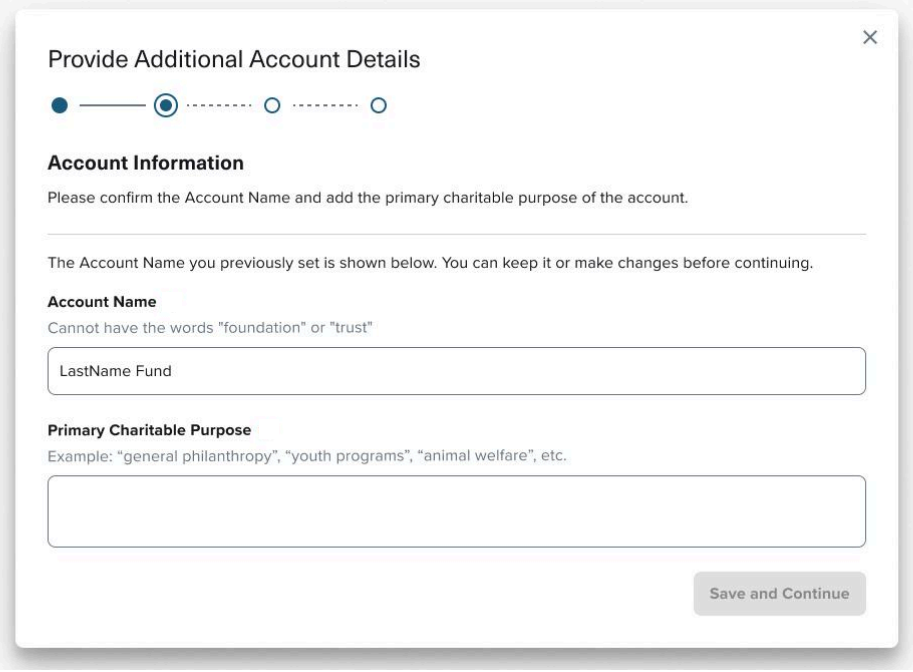


Confirm Account Name

Confirm the account name shown, which is pulled from the application. Edit if needed.

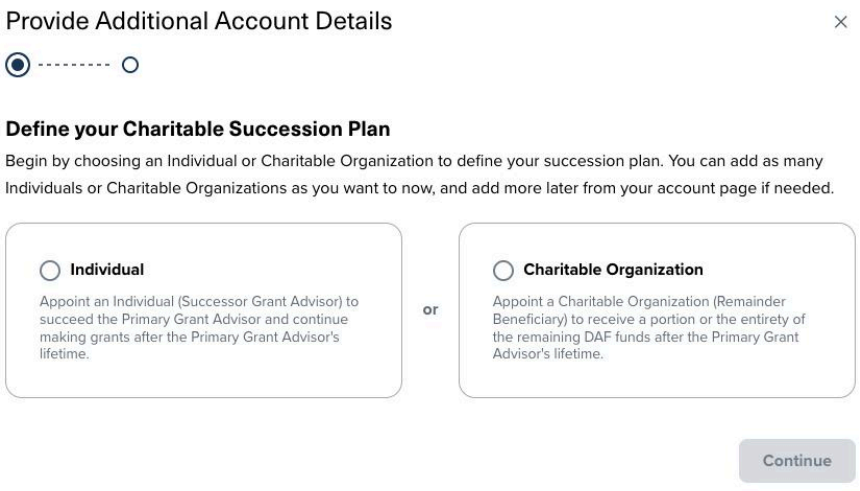
Enter Charitable Purpose

Describe the charitable purpose of this account. If no remainder beneficiaries or grant successors are named, this guides how we honor your intent for the account.



Define your Charitable Succession Plan

Choose an individual or charitable organization as the successor. Additional screens will follow based on your selection.

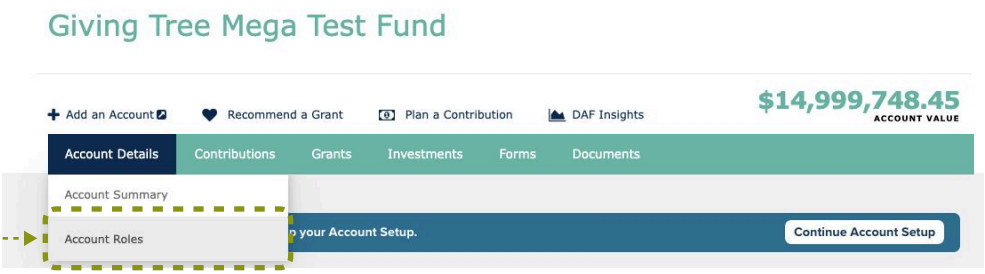


Managing Roles After Account Opening

If there are changes to a financial advisor, donor, grant advisor, successor grant advisor, or beneficiary successor, you can enter it directly in the platform.

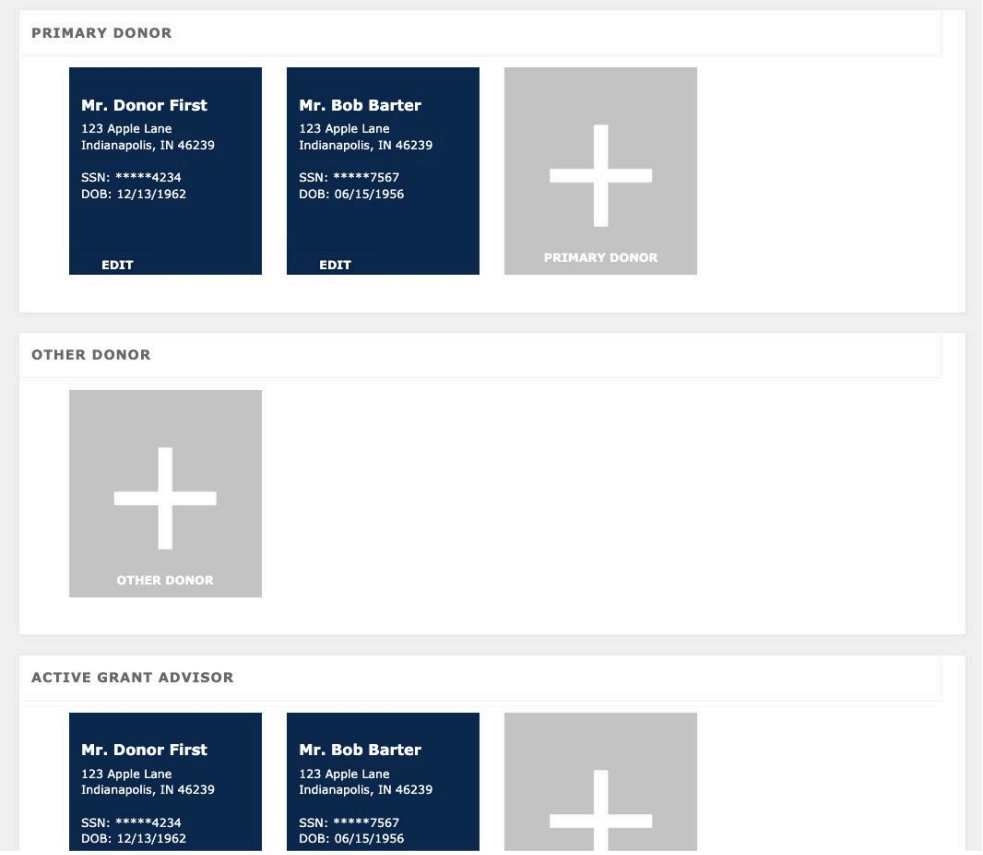
Find Account Roles

Select **Account Details** in the menu, then **Account Roles**.

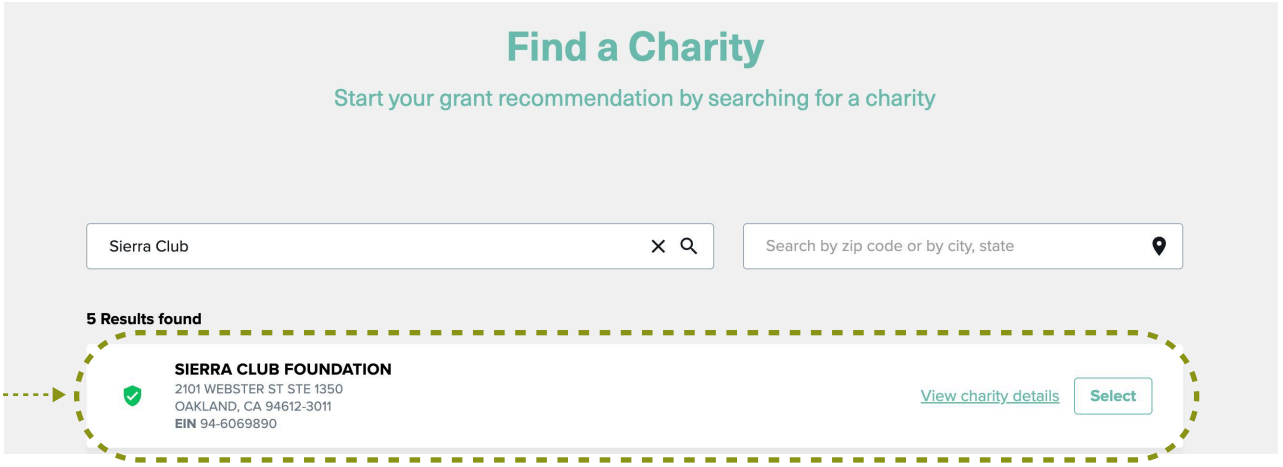


Manage Account Roles

Add, edit, or remove Grant Advisors, Successor Grant Advisors, Financial Advisors, or Interested Parties. Donors can be edited, but not added or removed. Removal requires a death certificate to be processed.

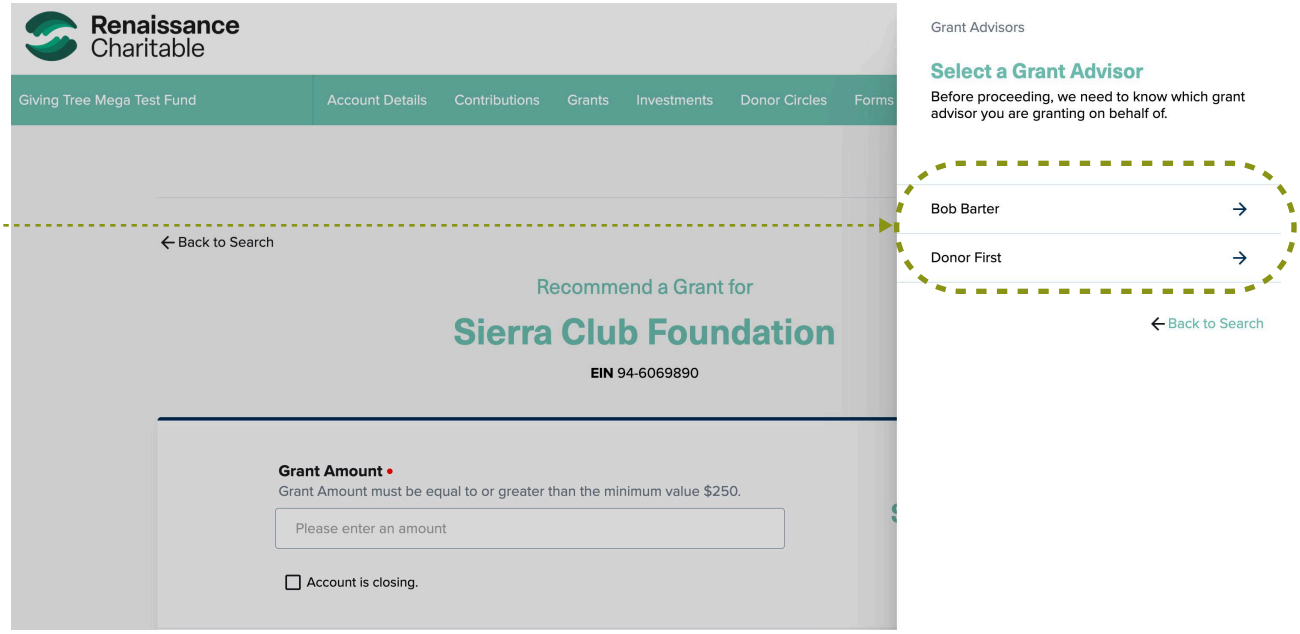


How to Recommend a Grant



Find a Charity

After selecting Recommend a Grant, you will need to search for the Charity by name, EIN or geographic location.



Select a Grant Advisor

Choose a Grant Advisor making this recommendation. If the person is not listed, you'll need to add them under Roles in the Account Details.

How to Recommend a Grant

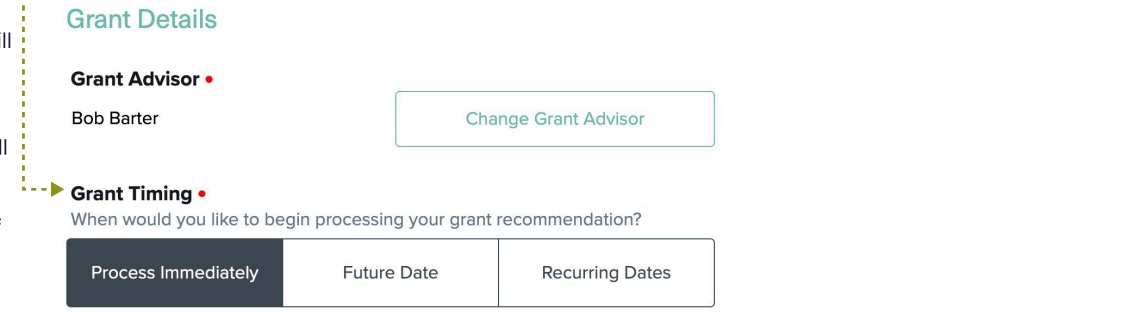
Grant Amount

The available grantable balance and the minimum grant amount are displayed for your convenience.



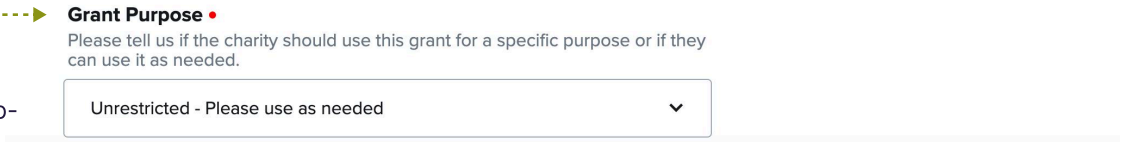
Grant Timing

You have three timing options:
Process Immediately: the grant will go directly into processing.
Future Date: Must be at least 30 days out and the date reflects the start of vetting, not when funds will arrive at the charity.
Recurring: Each recurring date represents when the processing of that grant will begin.



Grant Purpose

Tell the charity how the funds should be used. By default, it's unrestricted, but there is a drop-down list of options to choose from or fill in.



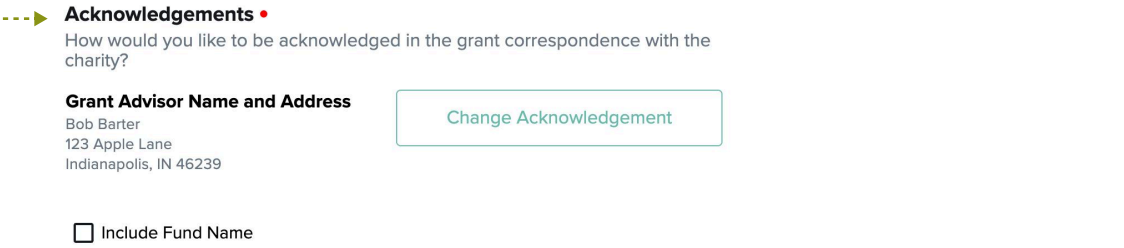
Dedications

Indicate if the grant is dedicated to someone. Note: Ren does not send any notification to the person being honored; this is only visible to the charity.



Acknowledgements

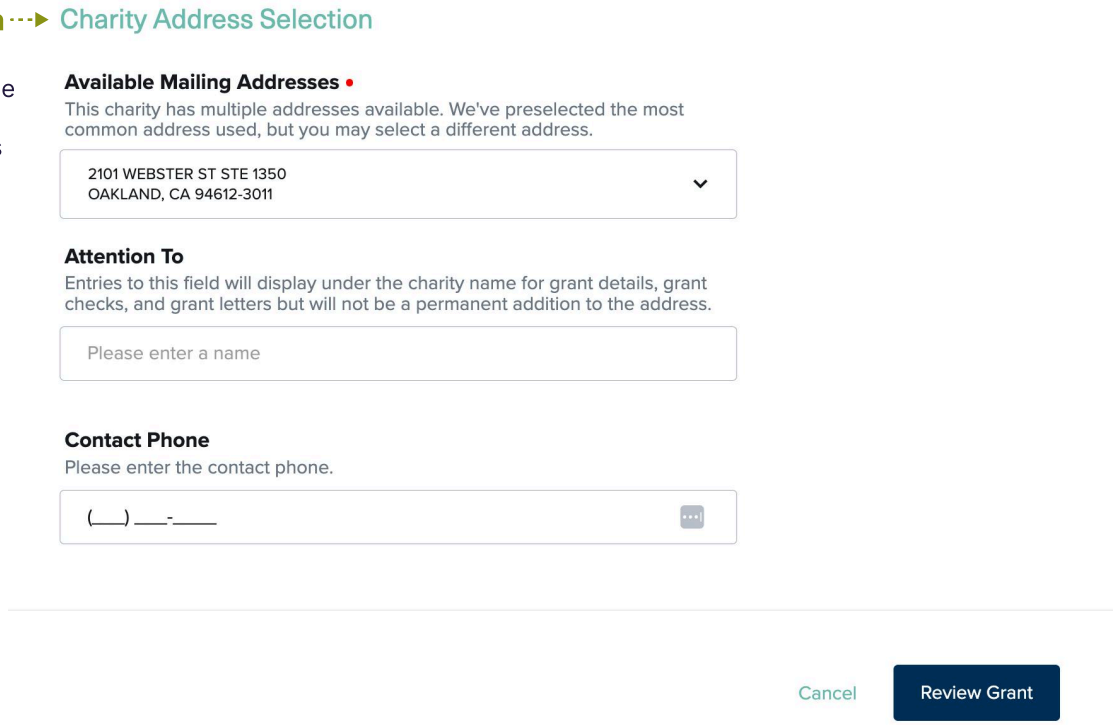
Specify what information the charity sees when they receive the grant. By default, this includes the grant advisor's name, email, and address, but you can customize it to show only your name, fund name, and address, or remain anonymous.



How to Recommend a Grant

Charity Address Selection

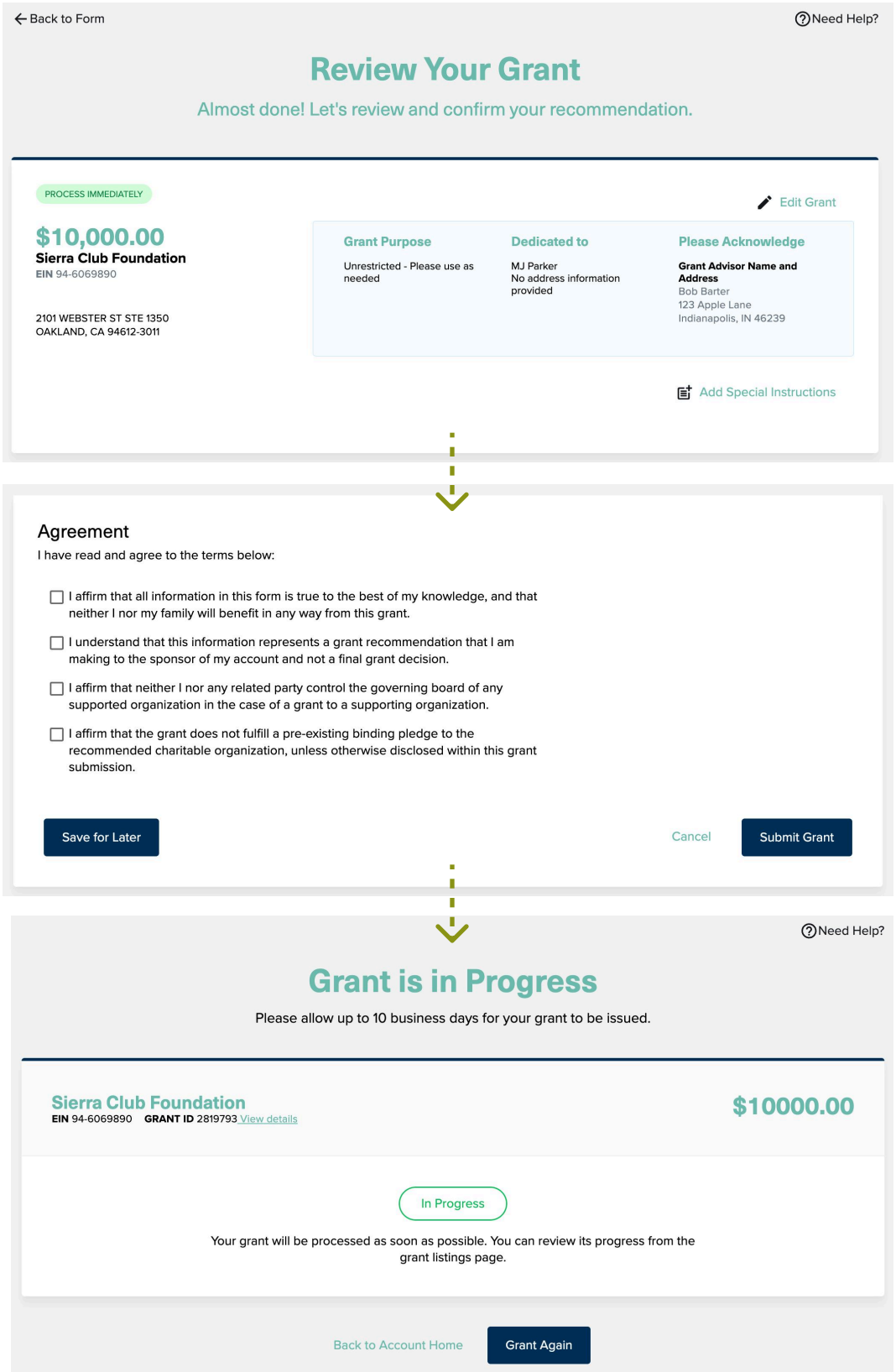
If you enter an address that isn't in the dropdown, it will need to be verified, which may add some processing time. The other fields are optional and allow you to share a charity's contact information, if you choose.



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Review Your Grant

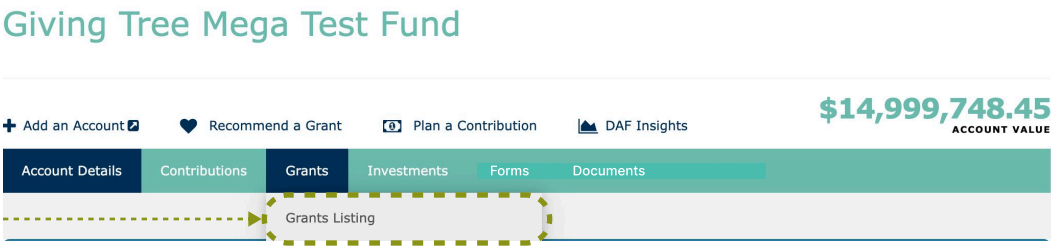
Review the details to ensure accuracy before submitting for processing.



How to Track Your Grant

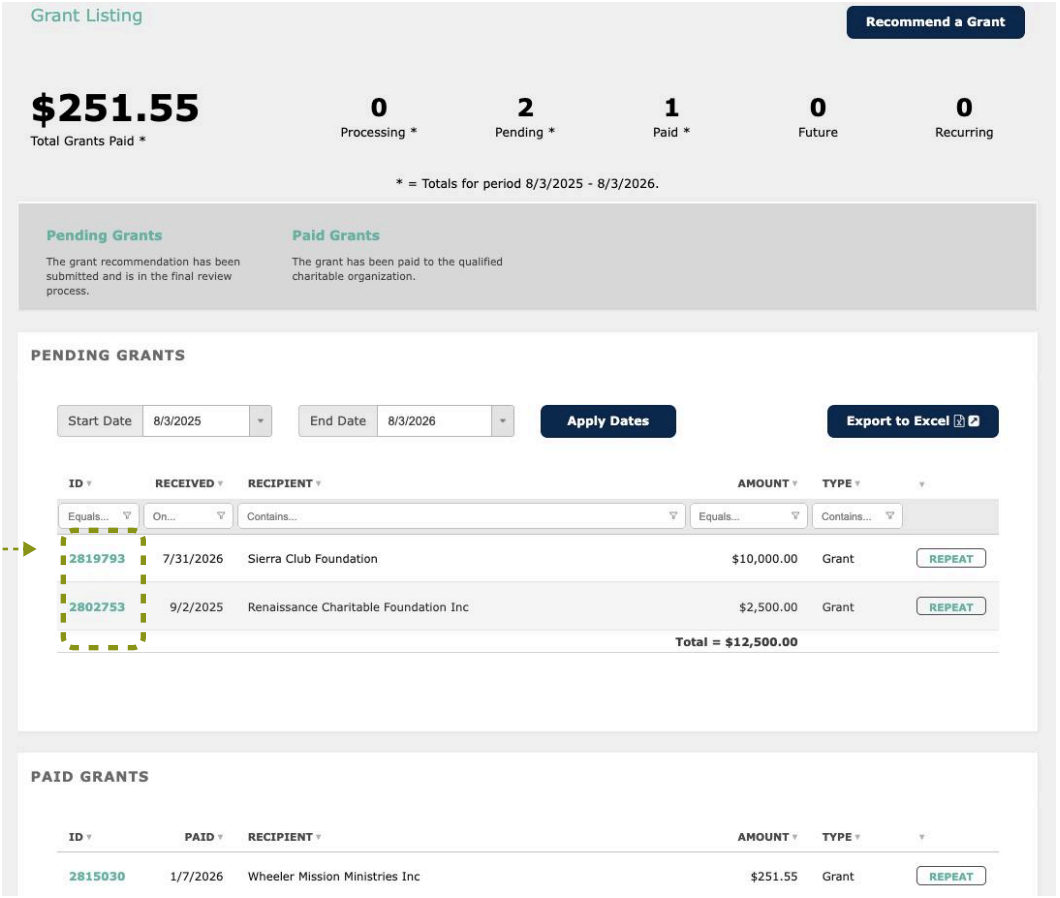
Find Grant Listing

Check your grant status, go to **Grants** > **Grants Listing** in the menu bar.



Grants Listing

Here you will find a list of all grants associated with the account, organized by Pending, Paid, and Recurring. Click the ID to showcase the grant tracker. Note: If you are looking at Recurring grants, be sure to filter by STATUS to see all the OPEN ones.

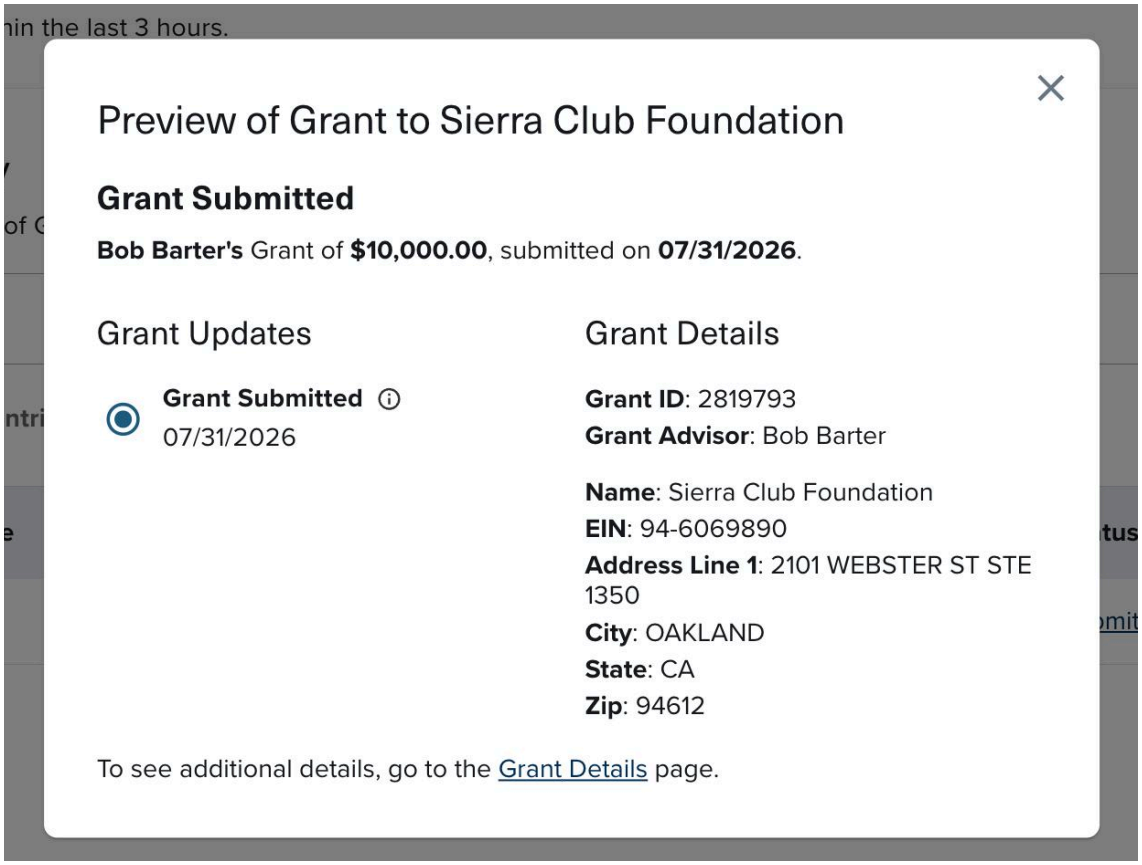


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How to Track Your Grant

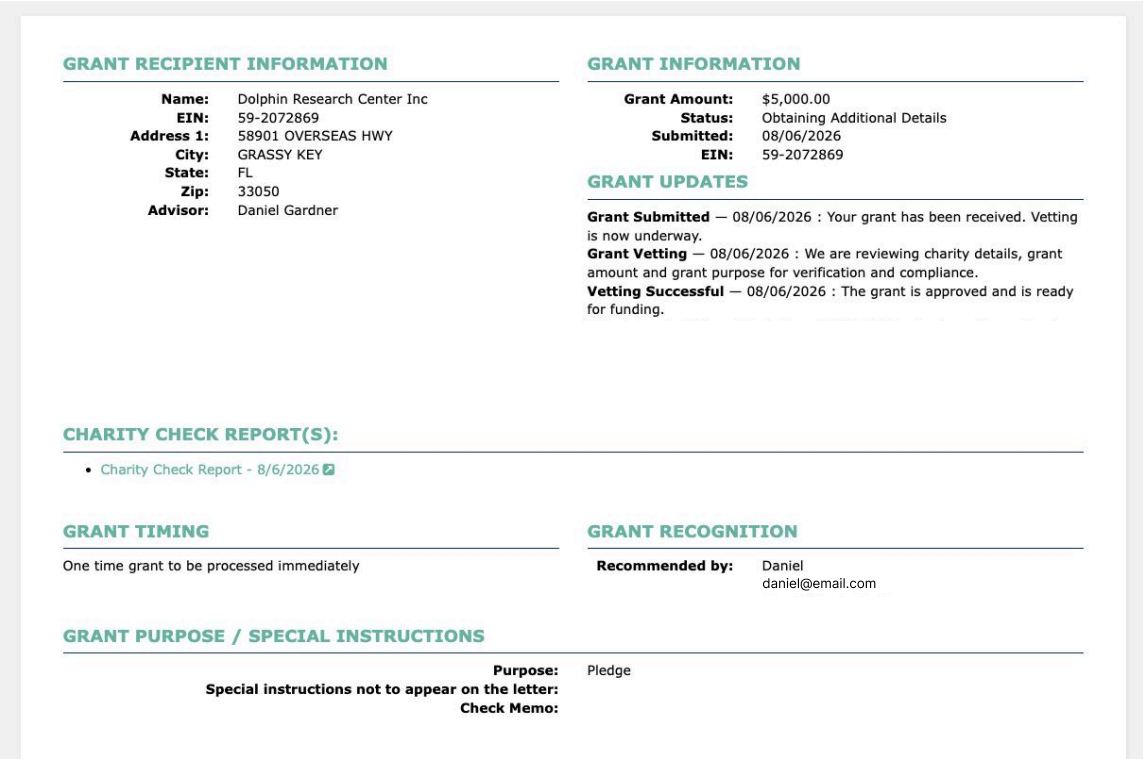
Grant Tracker

Upon clicking the Grant ID number, the grant tracker will pop-up. See additional details by selecting Grant Details at the bottom of the tracker.



Grant Details

The information on this page showcases key status updates and information that will appear on the charity's grant letter, like recognition and purpose. "Payment Received" indicates that funds have been received by the charity's bank.

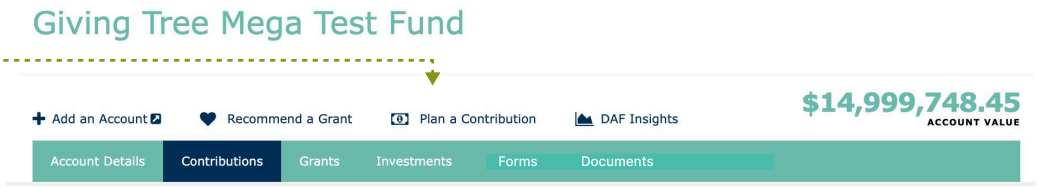


Add a Contribution

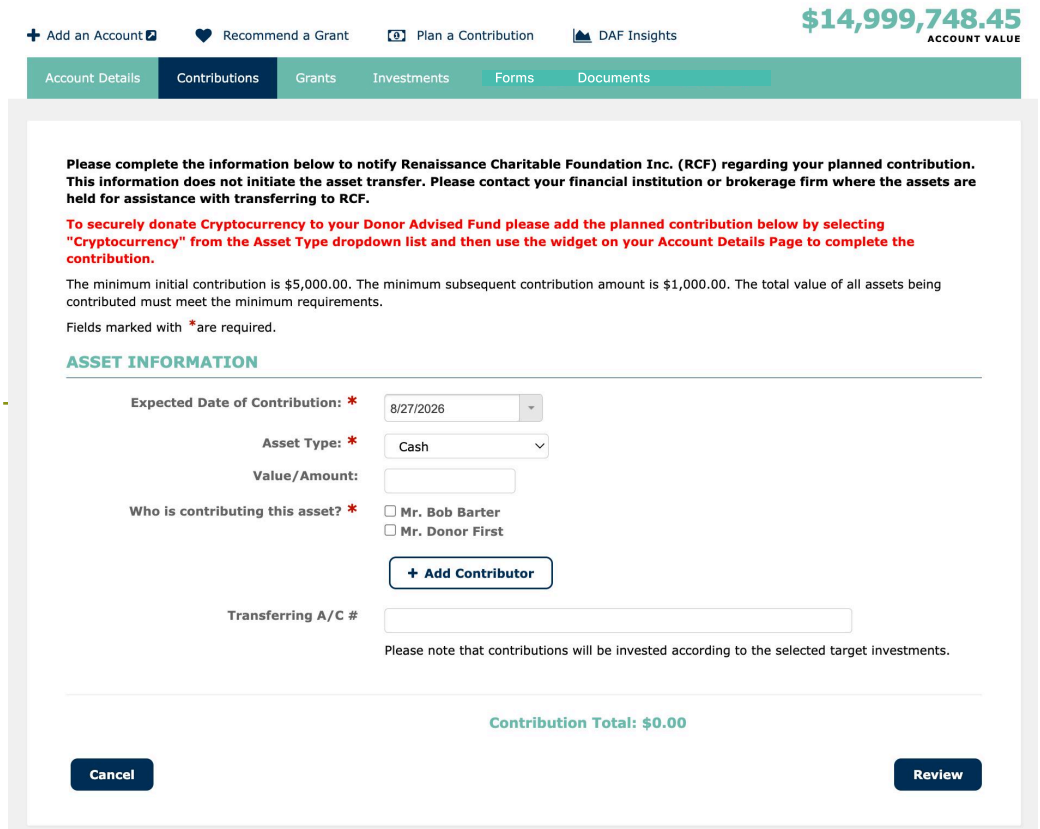
This action is done by your financial advisor. You must notify us of any additional contributions made or expected after your account is opened. This ensures the balance is reflected accurately and helps avoid delays in granting.

Don't rely on the firm's investment account for this information. Your minimum additional contribution amount is shown on this page.

Either select the Plan a Contribution quick link or in the menu bar select **Contributions → Plan a Contribution**

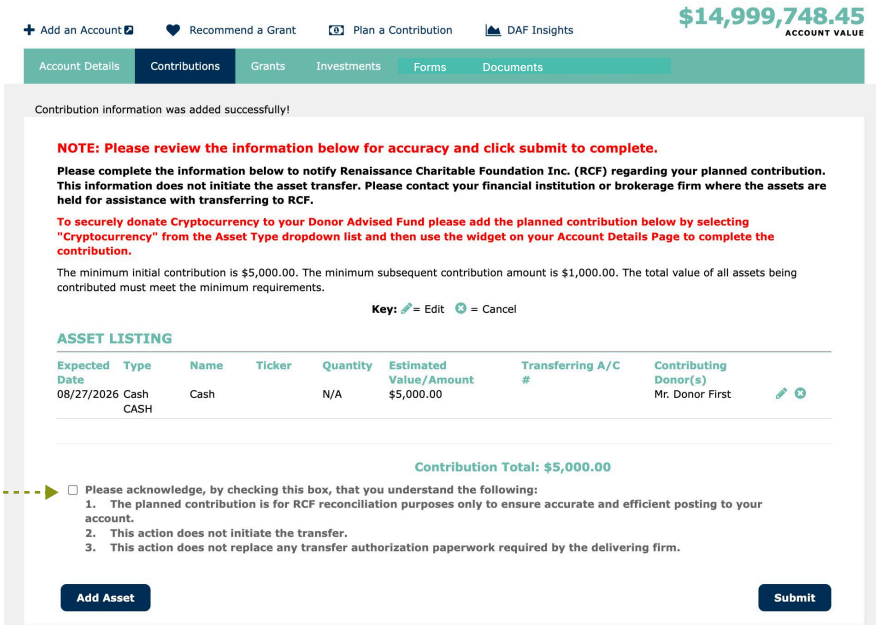


Enter the contribution date, asset type, and contributor, then select Review.



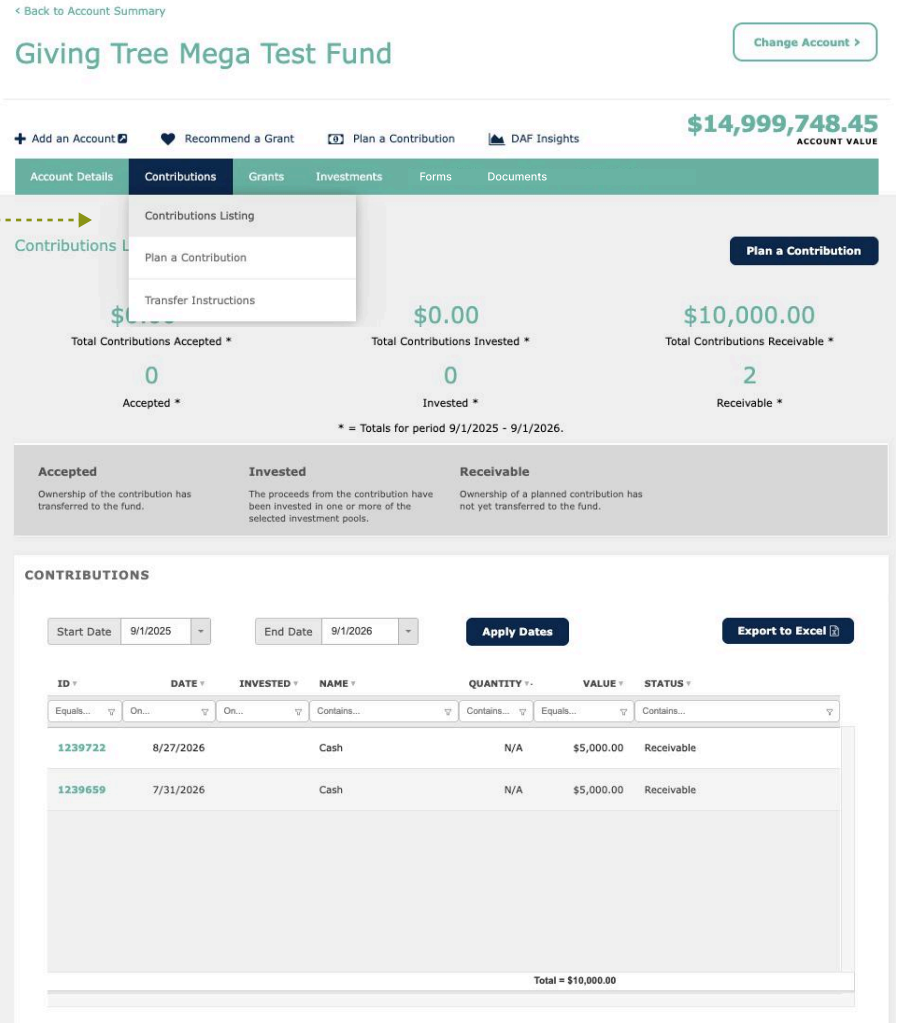
Add a Contribution

Review and acknowledge the details of this action.



Contribution Listing

View all the contributions to the account.



How to Get Contribution Letters and Statements

Statements tab

Clicking the Statements tab will take you to where you can find grant letters, contribution letters and account statements.

Year

Filters documents by the year they were generated. Example: a 2026 generated contribution letter will cover 2025 contributions.

Grant letter

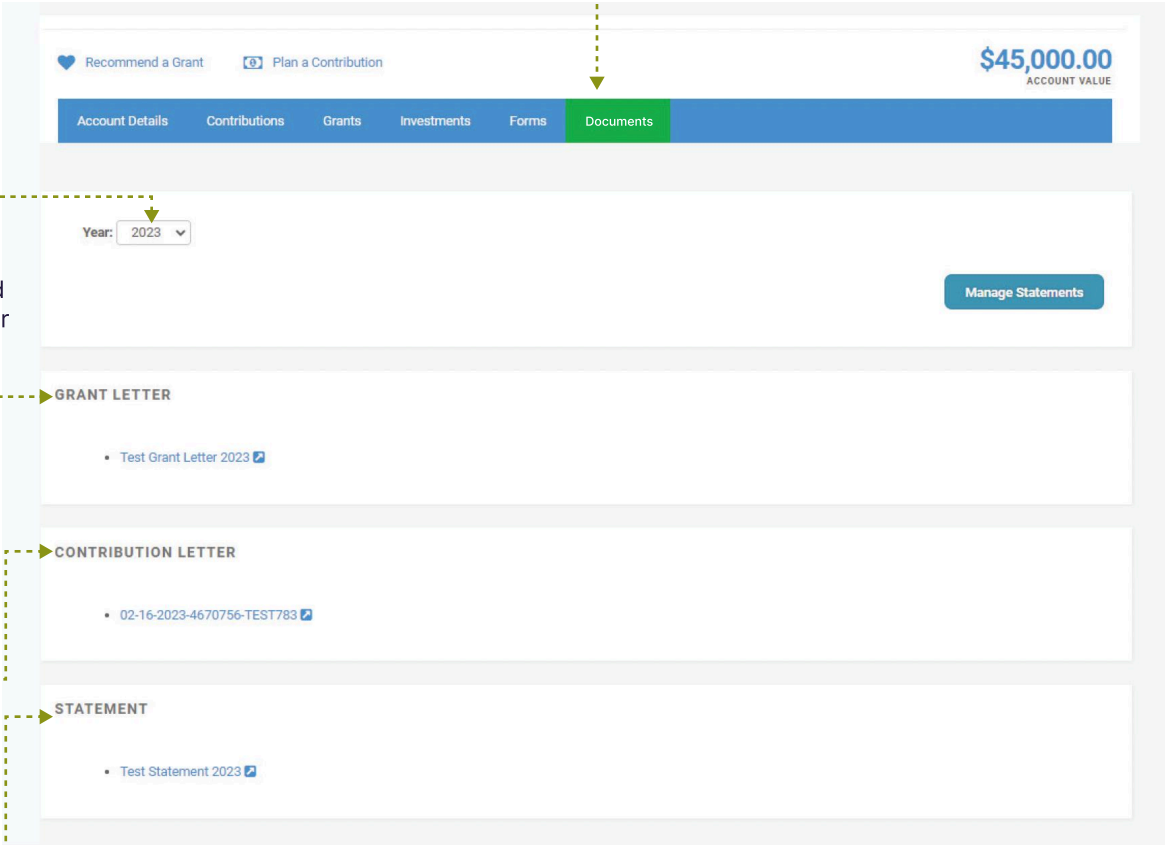
View grant letters sent to charities with processed grants. *Please note, if the grant is sent to the organization electronically, no grant letter will be generated.*

Contribution letter

Contribution letters can be used to supplement your tax preparation.

Statements

View quarterly statements for the account.



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Understanding Your Account Statement

Date

Date shows the quarter to which the statement applies.

Fund information

Fund information shows the name of the fund, the fund's code, and the fund's account number.

Account summary

Account summary shows the balance of the account at opening and close of the statement's quarter.

Account holdings

Account holdings provides a breakdown of the beginning and ending balances for underlying investments within the fund.

Contributions to account

A detailed listing of contributions and grants within the account during the quarter is shown in "Contributions to Account" and "Grants from Account."

Account Statement

January 1, 2023 - March 31, 2023

Special Giving Fund Account
Code: TEST178
Account Number: 12345

Renaissance Charitable Foundation Inc*
8888 Keystone Crossing Ste 1222
Indianapolis, IN 46240

To access your online account information, visit us @ https://xyz.donorfirstx.com.

Account Summary

Beginning Balance (January 1, 2023)	**$772,804.06**
Contributions to Account	$13,781.00
Grants Paid from Account	($10,000.00)
Market Value Changes	$13,288.85
Interest and Dividends	$0.00
Realized Gains (Losses)	$0.00
Account Fees	$0.00
Ending Balance (March 31, 2023)	**$789,873.91**

Account Holdings

Description	Beginning Balance	Change in Account Balance	Ending Balance	% of Account
Stock #1	$295,477.42	$0.00	$295,477.42	38.07%
Stock #2	$477,326.64	$3,288.85	$480,615.49	61.93%
Total	**$772,804.06**	**$3,288.85**	**$776,092.91**	**100.00%**

Contributions to Account

Date Received	Description	Quanity	Amount
03/02/2023	Stock #1	200.00	$13,781.00
Total			**$13,781.00**

This is our standard template. Your actual statement's layout may vary.