Renaissance Charitable

Any donor. Any gift. Any charity.

Homepage tour

▶ **Descriptions**

Quick links

Quick links are available for the most common actions; recommending a grant, planning a contribution, or downloading forms.

Fund details

Click to expand for full details on a fund.

Charitable impact

DFX shows you the impact of your giving by breaking grants into philanthropic categories.

Recent transactions

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

Questions?

Contact us toll-free at 800-811-4428 or ubs@reninc.com with questions on your RCF donor-advised fund.

Thorne Family Charitable Fund

Recommend a Grant   Plan a Contribution $45,000.00
ACCOUNT VALUE

Account Details | Contributions | Grants | Investments | Forms | Statements

ACTIVE   Thorne Family Charitable Fund   SHOW ACCOUNT DETAILS ▾

RECENT CONTRIBUTIONS

03/02/2022
Cash $45,000.00

View All

RECENT GRANTS

+
Recommend a Grant

GRANT CATEGORY

Education   66.1%
Voluntarism/ Grantmaking Foundations   22.7%
Religion   9.7%
Other   1.5%

Your Charitable Impact

Your giving has real impact! Here's how your grants are supporting the causes you care about most.

DOCUMENTS

Copy of Original Online Application (PDF)

RECENT CONTRIBUTIONS

12/27/2020
ABC Bank $23,745.94
12/23/2016
ABC Bank $27,325.57
12/23/2011
ABC Bank $20,070.00

View All

RECENT GRANTS

09/04/2019
Charity #1 $300.00
08/21/2018
Charity #2 $2,000.00
08/02/2018
Charity #3 $5,000.00

View All

Making a grant

▶ Descriptions

Get started

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

Charity search

Search our database of over a million charities to find one to receive the grant.

Select a charity to recommend

Choose from your favorite charities, manually enter information or search GuideStar to select your grant recipient.

Enter the grant amount

Be sure you meet the minimum indicated in the text above the box.
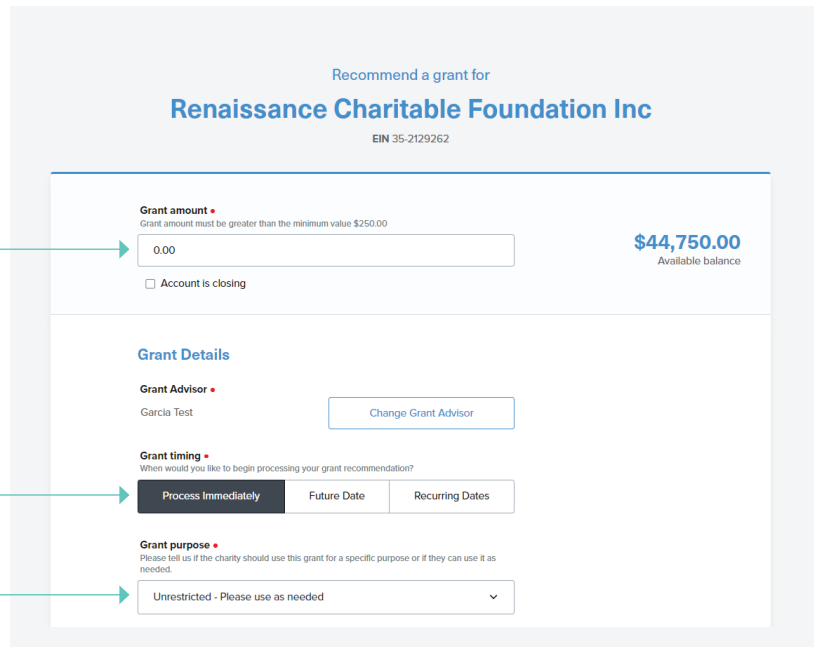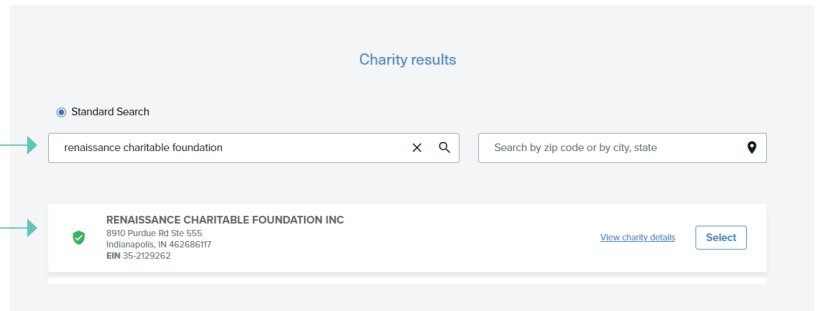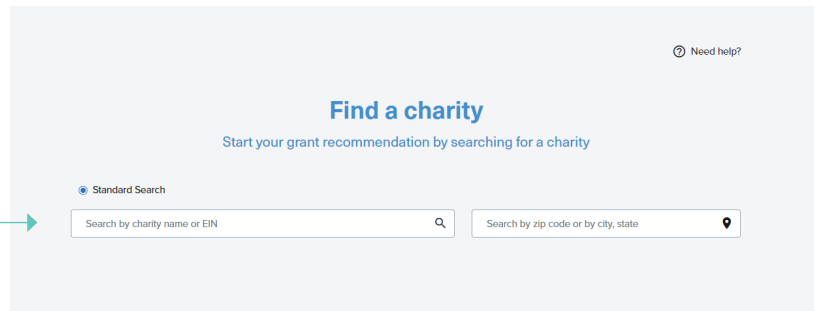
Grant timing

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

Please note that a future date selection indicates the date the grant review will begin and not the date of payment.

Grant purpose

Would you like the funds to be restricted to a specific purpose? Select a purpose from the dropdown. If you would like to add your own purpose, select "Other" from the dropdown and you will be able to write in your purpose in the "Describe grant purpose" box.

Please note that the charity will see this information on the grant letter for approved grants.

![Renaissance Charitable logo]
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DONOR USER GUIDE
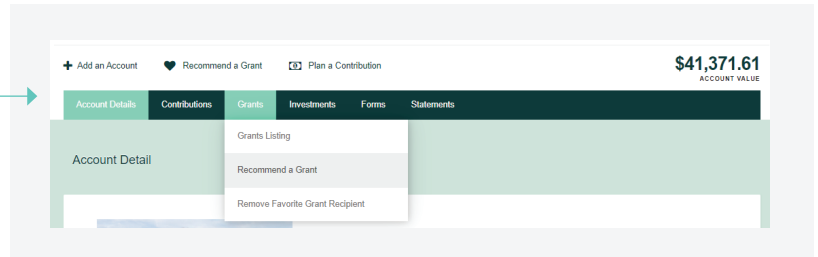
Making a grant

▶ Descriptions

Dedication

RCF allows you to choose if the grant will be dedicated to someone to honor them or their legacy.

Acknowledgment

RCF allows you to choose how you are recognized for the grant. Issue it in the name of the fund, the primary donors. Grants can also be issued anonymously. The default is "Fund Name Only". Please note, the charity will see this information on the grant letter for approved grants.

Review grant

Review the grant details before submitting the grant recommendation.

Review and submit

Read and acknowledge the terms of the grant. When ready, submit the grant for processing. Please note that the "Add Special Instructions" field is only for instructing the RCF team if you would like the grant sent overnight (There is a $25 fee for sending the check via overnight delivery).

These instructions will not be seen by the charity.

Status of grant

The status of your grant submission can be viewed under the 'Grants Listing' tab.

Dedications

Would you like to dedicate this grant to someone?
○ Yes   ● No

Acknowledgements •
How would you like to be acknowledged in the grant correspondence with the charity?

Fund Name Only
Thorne Family Charitable Fund   [Change Acknowledgement]

Delivery Method

How should the grant be delivered? •
Choose how the grant should be delivered to the charity and to what mailing address.

[Mail a grant check to the charity ⌄]

Charity address selection

Available mailing addresses •
This charity has multiple addresses available. We've preselected the most common address used, but you may select a different address.

[8910 Purdue Rd Ste 555
Indianapolis, IN 462686117 ⌄]

Attention to
Entries to this field will display under the charity name for grant details, grant checks, and grant letters but will not be a permanent addition to the address.

[Please enter a name]

Contact phone
Please enter the contact phone.

[(__) ___-____]

Cancel   [Review grant]

← Back to form   ⓘ Need help?

Review your grant
Almost done! Let's review and confirm your recommendation.

PROCESS IMMEDIATELY
$250.00
Renaissance Charitable Foundation Inc
EIN 35-2129262

Mail a grant check to the charity

8910 Purdue Rd Ste 555
Indianapolis, IN 462686117

✎ Edit Grant

GRANT PURPOSE	PLEASE ACKNOWLEDGE	INCLUDE FUND NAME
Unrestricted - Please use as needed	Fund Name Only Thorne Family Charitable Fund	Yes

Add Special Instructions

Agreement
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 neither I nor any related party control the governing board of any supported organization in the case of a grant to a supporting organization.

☐ 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 the grant does not fulfill a pre-existing binding pledge to the recommended charitable organization, unless otherwise disclosed within this grant submission.

[Save for later]   Cancel   [Submit grant]

![Renaissance Charitable logo]

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DONOR USER GUIDE

Finding documents

▶ **Descriptions**

Statements tab

Clicking the Statements tab will take you to the correspondence page.

Year

Documents are available based on the applicable year.
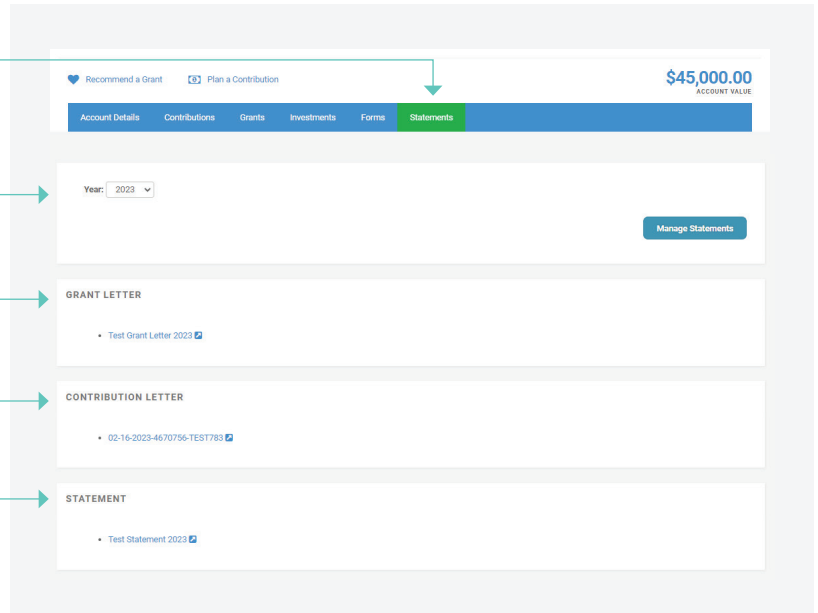
Grant letter

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 statement

▶ Descriptions

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*
8910 Purdue Rd, Suite 500
Indianapolis, IN 46268

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**

Updating your profile

▶ Descriptions

User preferences

Hover over your name to change your email, password, security questions and to customize email notifications.

Change password

Change your password using the parameters set by the organization.

Change security question

Update the security question to log in to your account if you lose your password.

Update email notifications

Opt-in to receive e-notifications regarding account activity.

Eberhardt, Chelsea   Log Out

Change Email

Change Password

Change Security Questions

Email Notifications

Change Password

Fields marked with * are required.

Enter Your Current Password *

Create Your New Password *

Confirm Your New Password *

Your password must meet these minimum requirements:

☐ Must be a minimum of 6 characters in total length
☐ Must be a minimum of 1 capital letters
☐ Must be a minimum of 1 lower case letters
☐ Must be a minimum of 1 numbers

Change Password

Change Security Question

Fields marked with * are required.

CHANGE SECURITY QUESTION

Use this form to set your security question and answer. This is the question you have to answer when attempting to retrieve your password.

* Security Question:
What is your Mother's maiden name?

* Answer to the Security Question:

* Confirm Answer:

Accept Changes

UPDATE YOUR EMAIL NOTIFICATIONS

☐ Contribution Received
☐ Correspondence Posted
☐ Grant Approved (Posted)
☐ Grant Paid
☑ Statement Posted

Save Changes