



## Header Navigation:

**Advisor View** – This view allows the Growfund account holder to manage nearly every aspect of their account. This is the only view accessible to a regular Growfund user.

**Client View** – This view is for administrators who wish to see an overview of all Growfund accounts linked to their organization. Details such as balances, contributions, withdrawals, change in value of investments, along with much finer details provided by drilldown features.

## Advisor View - Side Navigation:

### [My Activity Center](#)

**My dashboard** – This page provides an overview of the Growfund account. A Growfund account holder can use this page to review their fund balance, recent contributions to their Growfund as well as recent grants to charitable organizations. Handy for a quick glance.

**Review Fund activity** – This page provides a Growfund account holder with an in-depth look at the cash flows in and out of their account, with adjustable timeframes.

**Transfer between my accounts** – Growfund account holders with multiple accounts can use this page to transfer funds between them in a quick and easy manner.

**See my Fund relationships** – Growfund account holders can have a variety of roles on multiple accounts. For instance, a Growfund account holder may be a Primary Advisory (full control permissions) on one account while a Secondary Advisor (limited permissions) on another account. This page indicates a Growfund account holder's roles and permissions for every account that they are associated with along with the roles and permissions of everyone else associated with those accounts.

**Review Fund Interests** – Growfund account holders can indicate their giving interests on this page. By tagging interest areas, others within the Growfund community can find the account via the Giving Opportunity search feature.

**Update my Profile** – This is where a Growfund account holder can change basic account information, such as mailing address, email, password, security question, etc.

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## Contribute

**Contribute to my Fund** – This is where Growfund account holders can contribute to their account with a credit card. One-time contributions as well as recurring contributions can be made here. The first page gathers personal information while the second page captures the credit card information. Once submitted, the contribution is accepted as a donation and the funds will appear shortly within the account.

**Review history** – This is where a Growfund account holder can get an in-depth look at past contributions. Very handy come tax season.

## Make a Grant

**Charity search & recommend grants** – Growfund account holders can search for charitable organizations and recommend grants from this page. Simply search for an organization using the GuideStar search functionality, choose the organization, and recommend either a one-time or recurring grant to that organization. The Grantee List helps the Growfund account holder to keep track of recent grantees and those organizations on the account holder's 'watch list'. From here a Growfund account holder can add organizations to their Growfund Cart, a tool that allows account holders to recommend grants to multiple organizations through one convenient transaction.

**See my grant history** – Growfund account holders can view recent grant recommendations from this page.

**See my recurring grants history** – Growfund account holders can view information regarding existing and past recurring grant recommendations.

**Non listed charity search or suggest a grantee** – Growfund account holders can use this search functionality if they cannot find a particular organization of interest with the GuideStar search functionality. This is an expanded list of local and international organizations. If an account holder still cannot find what they are looking for, there is even an option to suggest a grantee for Global Impact to review and vet, and then make available for everyone.

## Giving Opportunities

**See all opportunities** – These are Growfund accounts created by other Growfund account holders, which can be contributed to via credit card or account transfer.

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**Give to featured impact areas** - Featured Impact Areas are one way that Growfund promotes worthy organizations or programs that are seeking funding for specific projects.

**Create my opportunity** – A Growfund account holder can create another Growfund account, perhaps with different charitable goals or a public account that can be accessible to friends and family, with this form.

## Contact Us

– Here’s where a Growfund account holder can get in touch with us if they have any questions or comments.

## **Client View - Side Navigation:**

**Contribution activity** – View and sort contribution data on all of the Growfund accounts linked to the parent organization.

**Withdrawals** – View and sort withdrawal data on all of the Growfund accounts linked to the parent organization. These are primarily grants made out of Growfund accounts to organizations. This is great for learning about what causes individuals tied to the parent organization care about.

**Organization activity** – This gives an overview of all the Growfund accounts under the parent organization, showing a collective beginning balance, total contributions, change in value of investments, etc.

**Consolidated statements** – Financial Statements for the parent organization, prepared on a monthly basis.

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