

GROWFUND EMPLOYEE HANDBOOK

The information enclosed is provided to inform every Growfund Advisor on how to navigate and utilize the features of Growfund. What Advisors will see upon login will allow them manage nearly every aspect of their account. This is the only view accessible to a Growfund user.

MY ACTIVITY CENTER

- **My Dashboard** – This page provides an overview of the Growfund account. This page is used to review fund balance, recent contributions to the Growfund account as well as recent grants to charitable organizations.
- **Review Fund Activity** – 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 others associated with those accounts.
- **Review Fund Interests** – Indicate 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** – Change basic account information, such as mailing address, email, password, security question, etc.

CONTRIBUTE TO MY FUND

- **Contribute to My Fund** – 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** – An in-depth look at past contributions (very useful come tax season).

MAKE A GRANT

- **Charity Search & Recommend Grants** – 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 will 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** – View recent grant recommendations from this page.
- **See My Recurring Grants History** – 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.
- **Give to Featured Impact Areas** - These one way that Growfund promotes organizations or programs that are seeking funding for specific projects.
- **Create My Opportunity** – A Growfund account holder can create a Featured Giving Opportunity, for a cause or charity that can be accessible to friends and family, with this form.

CONTACT US

- Get in touch with any questions or comments.