How to make an Inter-Account Transfer (Grant)

An inter-account transfer enables a registered user to transfer funds from the user’s fund to a giving circle. The transfer is considered a grant from the user’s standpoint. The steps follow:

1. At your own fund page, click on “Search Giving Circles and Opportunities.”

2. Then click on “Search All Opportunities”

3. Provide one or two key words of the Giving Circle; when it appears, click on LEARN MORE
4. The Giving Circle appear will appear with two action boxes; click on Inter-Account Grant

5. A screen will appear so that you can select the amount, indicate the purpose and add any instructions; click Submit

6. Your transaction is complete! It will appear as a grant on your fund page and as a contribution at the Giving Circle page