

WHAT'S IMPORTANT TO YOU IS IMPORTANT TO US

You choose your charities! Enjoy suggesting grants to any 501(c)(3) public charity in the United States, including your church, synagogue and alma mater. Rest assured that the Community Foundation will exercise due diligence to make sure grants are given to organizations that have met 501(c)(3) IRS requirements. In addition, the Community Foundation will ensure that grant suggestions are in accordance with IRS regulations. Please note that your fund cannot be used for the following purposes:

- To fulfill your personal irrevocable or legally binding pledge or other financial obligation made to a nonprofit, religious or educational institution;
- To support a political campaign;
- To purchase raffle tickets;
- To pay for a membership, dinner, or any other activity that provides a benefit to you;
- To pay for personal expenses incurred by a relative, including tuition;
- To provide any other substantial private benefit to any individual.

You get the credit! All grant checks feature your fund name on the check so the charity clearly understands the donation is from you. If you choose to make an anonymous grant, the check will read “Anonymous Donor.” To protect your privacy, we do not share your contact information with nonprofit organizations. Any correspondence that is sent to your fund’s attention at the Community Foundation’s address will be forwarded to you.

You pick the investment option that is right for you! You may choose to let your financial advisor manage your assets or invest your funds in one or more of the Greater Kansas City Community Foundation’s investment pools.

Community Foundation’s pools: Equity, Fixed Income, Alternative Investment and Money Market

If you would like a description of each pool, please contact donor services at (816) 842-7444 or service@gkccf.org. To change your investment mix, visit the “Download Forms” section from your homepage and print off the Investment Recommendation form. You may change your current mix at any time. However, the Community Foundation physically moves assets only at the close of each month.

Fund statements—green living, green giving! For the health of the environment, all fund statements are posted online and are available to e-mail or download at the bottom of your fund summary. To request that hard copies be mailed to you, please contact donor services.



A BETTER WAY TO GIVE. A BETTER KANSAS CITY.

How to use YOUR FUND

FUND NAME

FUND IDENTIFICATION NUMBER

ONLINE USER NAME

ONLINE PASSWORD

Donor Services Center

1055 Broadway, Suite 130 • Kansas City, MO 64105

P (816) 842-7444 • F (816) 842-0318 • service@gkccf.org • www.gkccf.org

FUND ESSENTIALS

Your Fund Establishing Document. This is the document you signed to establish your fund. You may revise this document at any time by contacting the donor services department at the Community Foundation, service@gkccf.org or (816) 842-7444. Keep a copy of your Establishing Document with your other important records.

Your Fund Name. You may change the name of your fund at any time by contacting donor services at service@gkccf.org or (816) 842-7444. The Community Foundation will publish the name of your fund in its annual report. If you would prefer that the Community Foundation not publish your fund name, please contact donor services. Of course, all information about your fund is confidential. You even can choose to send anonymous grant checks from time to time if you wish.

Your Fund Identification Number. Your fund has its own identification number, similar to an account number at a financial institution. You will need your fund identification number if you choose to make contributions to your fund by mailing a check, making a wire transfer of cash or securities, or transferring stock certificates, and/or if you choose to grant from your fund by e-mail, fax, or mailed request to donor services. (If you don't have your fund identification number handy, the Community Foundation can look it up for you.)

Your Online User Name and Password. The most direct way to manage your fund is online through the My Fund system at www.gkccf.org. You can check your fund balance, review a fund statement, review and sort historical contribution and grant activity within your fund, and make grants from your fund to any nonprofit organization of your choice, anywhere in the country.

TIP: When you use your fund to organize all of your giving, tax time is a breeze. Just click the year-to-date contribution history in the online system for a total of your tax-deductible contributions to your fund. (Contributions to your fund are tax-deductible charitable gifts. Grants out of your fund are not.)

Contribution and Grant Forms. Forms for gifts to your fund are available online in the My Fund section, or you can contact donor services at service@gkccf.org or (816) 842-7444 to have the forms sent to you. You can contribute to cash, stock and mutual funds, as well as other types of assets.

MY FUND...ONLINE!

Let's Get Started! To manage your fund online, including checking your balance, making a grant or updating your contact information, start at our Web site, www.gkccf.org, and click the My Fund tab. Click the Log In button to enter your online user name and password.

Upon logging in, our online system will greet you with your name. However, grant checks from your fund will be printed with the name of your fund, not your own name. If you need your user name and/or password reset, please contact donor services at (816) 842-7444 or service@gkccf.org.

TIP: You can change your password at any time through the My Fund system.

Frequently Asked Questions About the My Fund Online System

Q: How quickly are contributions posted to my fund?

A: The fund summary page displays the balance and year-to-date activity. Contributions will normally be reflected within three working days of receipt. Receipt of assets other than cash (stock gifts, real estate, etc.) may take longer to be reflected in the fund balance. Administrative fees and net investment returns (realized and unrealized capital gains and losses, interest, dividends and investment management fees) are allocated monthly. Contributions are reflected as of the date their deposit is confirmed.

Q: What confirmation will I receive from the Community Foundation that my grant requests have been completed?

A: You will receive a confirmation message that your grant request is being processed, and another confirmation when your grant check has been mailed. Please allow three to five business days for processing grants.

Q: Are grant checks mailed to the organization directly, or are they mailed back to me so that I can personally mail them to the organization?

A: It's your choice! At the bottom of the online grant suggestion form is a drop down box where you can choose to have the check mailed directly to the organization from your fund or request a check to be mailed to you for personal delivery.