

STEP-BY-STEP INSTRUCTIONS: MAKE A GRANT REQUEST

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Access My Fund

Congratulations! You have successfully logged in to Access My Fund, your secure, comprehensive source for all aspects of your fund.

Now that you're logged in, use the navigation on the right to:

- View your Fund Balance
- View the Gifts you have made, and make additional contributions to your Fund
- View your Grants and see the amount available for grantmaking
- Make a Grant Request
- Update your Profile

For a printed version, download the [Donor Advised Fund Grant Recommendation Form](#) Now.

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Make A Grant Request

This is where you put your fund to work. Recommend an organization or other non-profit for a grant, fill out the information, and we will process your request. If we have any questions about your recommendation, we will call you promptly.

You will always know what's happening with your grant recommendations. Check the status of any grant request here.

Advisor Information

Advisor Name

Email address where confirmation will be sent:

Select Fund:

Grantee Organization Information

You may select from a list of Grantee Organizations you have previously recommended; a list of other Grantee Organizations the Foundation has approved; or enter the required information for a Grantee Organization not listed.

3 Grantee Organization Options

[Select From List of My Grantee Organizations](#)
[Select From List of Foundation Approved Grantee Organizations](#)
[Enter New Grantee Organization](#)

Address:

Contact person:

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Option 1: 'Select From List of My Grantee Organizations'



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Select Fund: **Your fund(s) appears here**



Organization Name Address City/State

Grantee name and address appears here

Create Grant

Grantee name and address appears here

Create Grant

Grantee name and address appears here

Create Grant


Didn't find what you were looking for?

[Select from List of Foundation Approved Grantee Organizations](#)
[Enter New Grantee Organization](#)






[Download Step-by-Step Instructions for Online Grantmaking](#)

Option 2: 'Select From List of Foundation Approved Grantee Organizations'

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 THE COMMUNITY FOUNDATION FOR NORTHEAST FLORIDA

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Grantee Search

Grantee Organization: ←

Please be specific

SEARCH CLEAR FORM

NEW RECIPIENT

If the grantee is in our Foundation Approved list, you will get a list of names/addresses of organizations and a link to 'Create Grant'

If the grantee is NOT in our approved list, your search will be empty.

Example: If you typed 'Boys and Girls Clubs'

Grantee Search

Grantee Organization:

SEARCH

CLEAR FORM

NEW RECIPIENT

Organization Name	Address	City/State	
Boys and Girls Clubs of Central Florida, Inc.	801 N. Magnolia Ave., Suite 305	Orlando, FL	Create Grant
Boys and Girls Clubs of Marion County	P.O. Box 4109	Ocala, FL	Create Grant
Boys and Girls Clubs of Northeast Florida, Inc.	555 West 25th Street	Jacksonville, FL	Create Grant
Boys and Girls Clubs of the Chattahoochee Valley	1700 Buena Vista Road	Columbus, GA	Create Grant



**If there were no Foundation Approved organizations,
you would see this....**

Grantee Search

Grantee Organization:

SEARCH

CLEAR FORM

NEW RECIPIENT

Organization Name

Address

City/State



Please try your search again or
click 'New Recipient'

Option 3: 'Enter New Grantee Organization'

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New Grantee Data Entry

Organization	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code	<input type="text"/>
Contact Name	<input type="text"/>
Title/Position	<input type="text"/>
Contact Phone	<input type="text"/>
Contact Email	<input type="text"/>



Enter all of the data for the new grantee

Click 'Save'

You will be returned to the 'Make A Grant Request' page to complete your submission

Once you click 'Save', you will be redirected to the 'Make a Grant Request' page to complete the rest of your request form.

Check this box if you wish to have this grant made anonymously (optional)

Recommend Grantee Organization [Select From List of My Grantee Organizations](#)
[Select From List of Foundation Approved Grantee Organizations](#)
[Enter New Grantee Organization](#)

Recommended Grantee Organization:

Address:

Contact person:

Telephone:

Grant Information

Recommended Grant Amount (no \$ sign)

Minimum amount for which a grant may be recommended is \$250.00.

Enter purpose of grant if other than for General Operating Support of Grantee Organization.

Special Request or if the grantee has changed their address, please enter the new address here

I wish to have this grant made anonymously.

Legal Statement (CF-JAX)

Advisor Acknowledgment:

I recommend the above grant(s) to the Board of Trustees from the above named fund. I acknowledge that I am a named advisor to the above named fund, that these recommendations do not represent the payment of any legally enforceable pledge, nor do I expect or will I accept any goods or services as a result of these charitable distributions.

You will receive an email confirming your recommendation has been received by the Foundation. You will be contacted by a member of the Foundation's staff without delay if we have any questions. Please check the 'I Agree' button and click 'Submit' to process your request.

I Agree

and Click Submit

SUBMIT

CANCEL

Remember to check, 'I Agree'