Making a Grant from The Rotary Foundation DAF Online Portal

Step 1. Log into the DAF portal here: https://www.your-fundaccount.com/rotary/
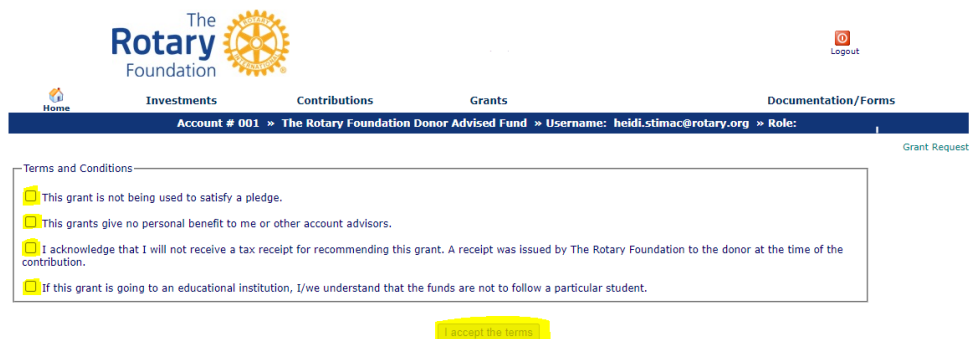
    a.   Forgot your DAF portal password? Click the "Forgot Password" link in the login box
           i.   You will be asked to provide your User Login ID.
          ii.   Forgot your ID? Reach out to plannedgiving@rotary.org
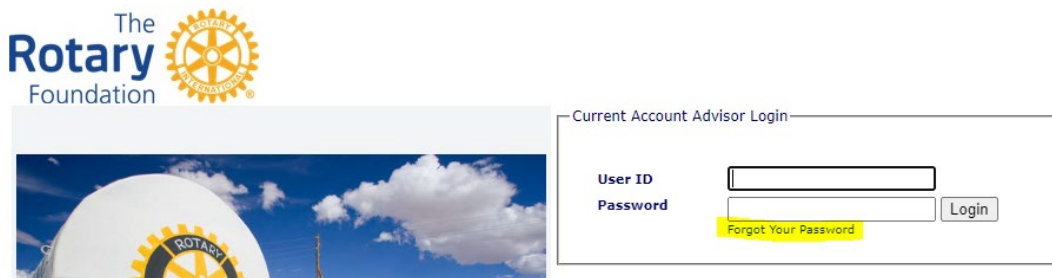
Step 2. Once you are logged in, under the "Grants" tab, select "Make a New Grant."
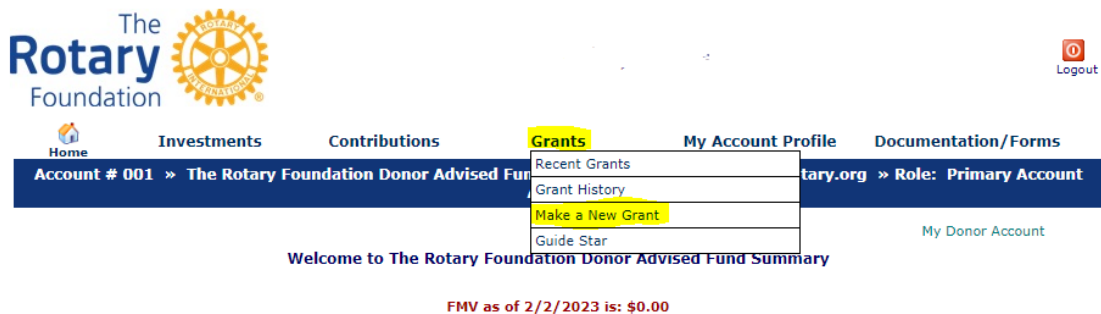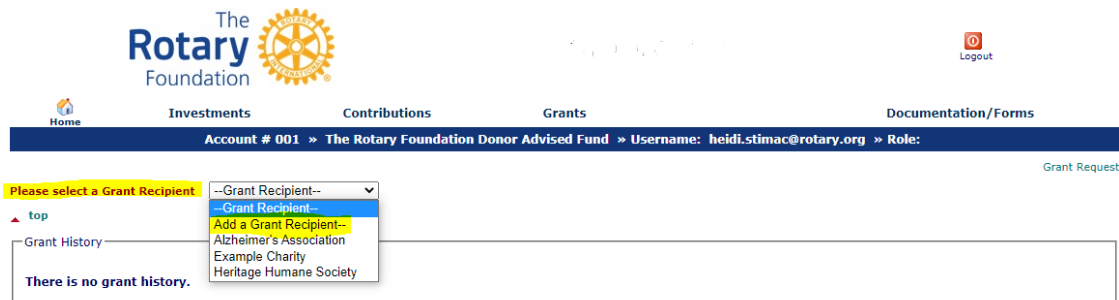

Step 3. Read and accept the terms and conditions.

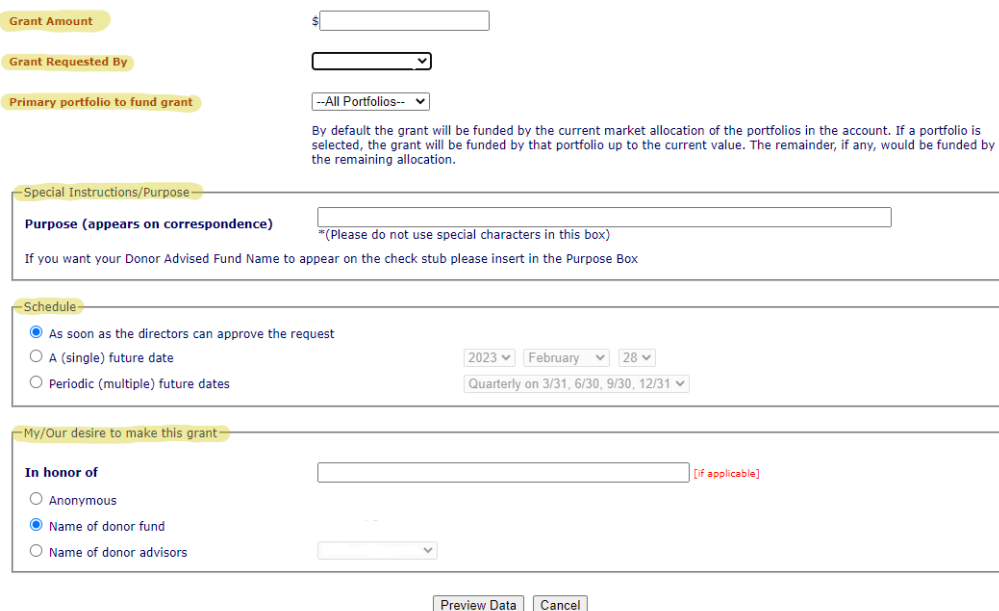**Step 4.** Select your grant recipient from the dropdown menu.

    a. Grant recipient not listed in the dropdown menu? Select the "Add a Grant Recipient" option
        i. Enter the grant recipient's information. Required information includes: EIN, organization name, and legal mailing address
        ii. You will then be rerouted to the Make a New grant tab. Select your new recipient from the dropdown menu

Step 5. When prompted, enter the grant amount.
    a. Enter any special instructions or purpose for the grant
    b. Enter when you would like the grant issued
    c. Enter any "In Honor of" information, if applicable

Step 6. Click the "Preview Data" button at the bottom of the page and review the information you have entered.

Grant Amount	$ [ ]
Grant Requested By	[⌄]
Primary portfolio to fund grant	[--All Portfolios-- ⌄]

By default the grant will be funded by the current market allocation of the portfolios in the account. If a portfolio is selected, the grant will be funded by that portfolio up to the current value. The remainder, if any, would be funded by the remaining allocation.

— Special Instructions/Purpose —

Purpose (appears on correspondence) [   ]

*(Please do not use special characters in this box)

If you want your Donor Advised Fund Name to appear on the check stub please insert in the Purpose Box

— Schedule —

◉ As soon as the directors can approve the request
○ A (single) future date   [2023 ⌄] [February ⌄] [28 ⌄]
○ Periodic (multiple) future dates   [Quarterly on 3/31, 6/30, 9/30, 12/31 ⌄]

— My/Our desire to make this grant —

In honor of [   ] [if applicable]
○ Anonymous
◉ Name of donor fund
○ Name of donor advisors   [⌄]

[Preview Data] [Cancel]

Step 7. Scroll to the bottom of the page and select "Submit."

Step 8. Your grant request is now complete and pending approval from The Rotary Foundation.

Questions? Please reach out to plannedgiving@rotary.org or (847) 866-3100