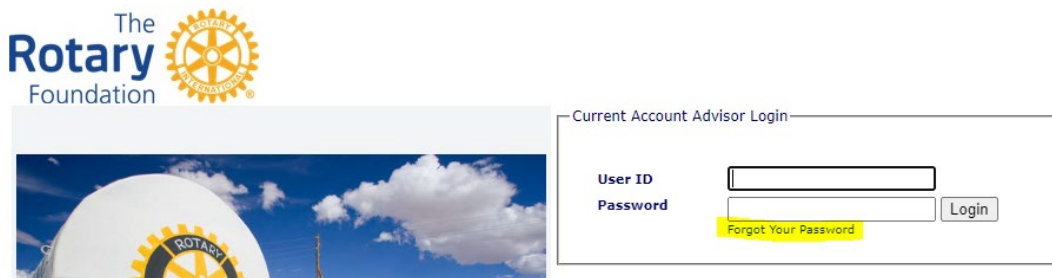


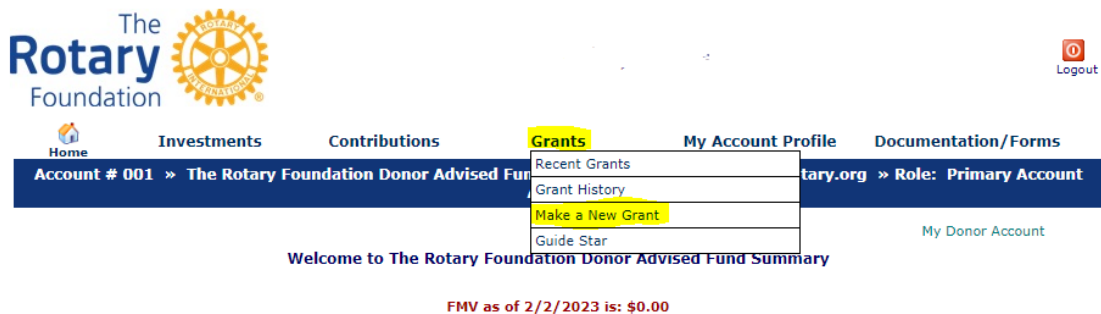
Making a Grant from The Rotary Foundation DAF Online Portal

Step 1. Log into the DAF portal here: <https://www.your-fundaccount.com/rotary/>

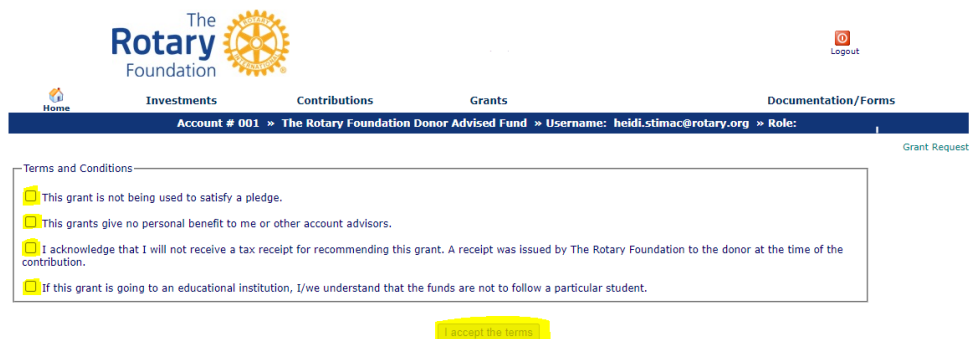
- a. Forgot your DAF portal password? Click the “Forgot Password” link in the login box
 - i. You will be asked to provide your User Login ID.
 - ii. Forgot your ID? Reach out to plannedgiving@rotary.org



Step 2. Once you are logged in, under the “Grants” tab, select “Make a New Grant.”

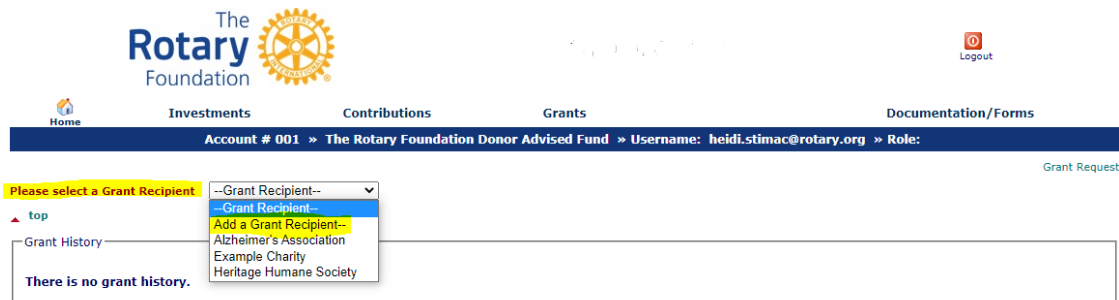


Step 3. Read and accept the terms and conditions.



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

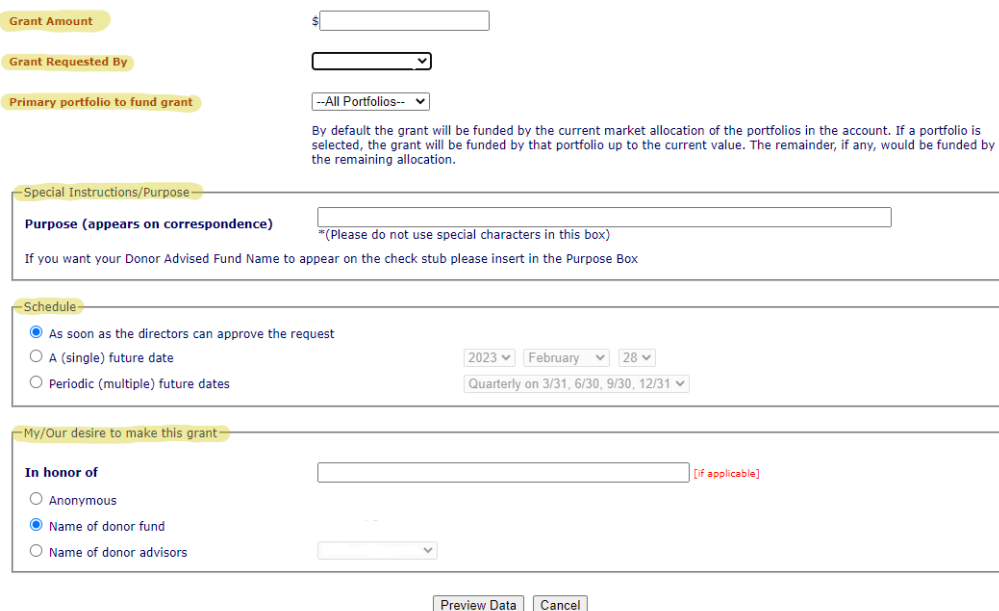
- a. Grant recipient not listed in the dropdown menu? Select the “Add a Grant Recipient” option
 - i. Enter the grant recipient’s information. Required information includes: EIN, organization name, and legal mailing address
 - ii. You will then be rerouted to the Make a New grant tab. Select your new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



The screenshot shows the Rotary Foundation donor portal interface. The user is logged in as 'heidi.stimac@rotary.org'. The 'Grants' tab is selected. A dropdown menu is open for 'Please select a Grant Recipient', showing options: '--Grant Recipient--', 'Add a Grant Recipient--', 'Alzheimer's Association', 'Example Charity', and 'Heritage Humane Society'. The 'Add a Grant Recipient--' option is highlighted. Below the dropdown, there is a text box that says 'There is no grant history.'

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



The screenshot shows the grant request form with the following sections:

- Grant Amount:** A text input field with a dollar sign prefix.
- Grant Requested By:** A dropdown menu.
- Primary portfolio to fund grant:** A dropdown menu with the option '--All Portfolios--' selected.
- Special Instructions/Purpose:** A text input field with a note: "(Please do not use special characters in this box)". Below it, a note says: "If you want your Donor Advised Fund Name to appear on the check stub please insert in the Purpose Box".
- Schedule:** Radio buttons for:
 - As soon as the directors can approve the request (selected)
 - A (single) future date (with date pickers for 2023, February, 28)
 - Periodic (multiple) future dates (with a dropdown for Quarterly on 3/31, 6/30, 9/30, 12/31)
- My/Our desire to make this grant:** Radio buttons for:
 - Anonymous
 - Name of donor fund (selected)
 - Name of donor advisors (with a dropdown menu)

At the bottom of the form are buttons for 'Preview Data' and 'Cancel'.



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

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

Periodic (multiple) future dates

My/Our desire to make this grant

In honor of [if applicable]

Anonymous

Name of donor fund

Name of donor advisors

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