



## *Welcome to Donor Central!*

**Your Username:**     \_\_\_2403

**Your Password:**     \_\_\_\_\_

In an effort to be more environmentally conscious and cost efficient, here are instructions for use of our Donor Central website, ACT's secure online access to your fund information, and available 24 hours a day.

### **Getting Started:**

- Go to our website at [www.generousact.org](http://www.generousact.org). Under the Donor section of the Home page, you will see a link for Donor Central. Please click on the link.
- On the Donor Central Log In page enter your username and password. Each fund has a separate username and password. You may elect to change your password.
- After entering in your username and password you will be directed to Donor Central Online. You now have access to your fund(s). You may view gifts made to your fund, recommend a grant, view grants made from your fund and download forms. You may change your password upon logging in at anytime. ACT will not have access to this new password, but we can reset it at anytime. Should you forget your password, click on the link that says "Forgot your password? Click here." You will be prompted to enter your e-mail address so your password can be sent to you. Please keep in mind that the e-mail address must match the address we have on file.

### **Navigating:**

- **Available for Grants** reflects current available funds. This figure is determined using ACT's spending policy (5% of the fair market value of the fund averaged over the proceeding 12 quarters for endowed funds).
- **Change Password** is where you can change your password to a word or number (at least 6 characters in length) only you will know and remember.
- **Contact Us** provides the contact information for the staff if you have questions about your fund or Donor Central
- **Download Forms** is a link to ACT's grant recommendation form donor-advised fund guidelines, gift of stock instructions and other helpful documents.
- **Fund Balance** includes combined principal and income balances as of the most recently posted quarter, and does not reflect current gifts, current grants and grants pending, which are updated daily.
- **Fund Status Report** allows you to view, print or e-mail Fund Statements. We keep Fund Statements on-line for two quarters only. If you need earlier reports, please contact the office.

- **Fund Summary** provides fund information for the current year, previous year and for the life of the fund. The date shown at the top of the Cumulative column is the date of the inception of the fund. Please note if you advise multiple funds, they are shown in aggregate. If you would like to view individual funds in detail a link is provided at the top of the Summary Page.
- **Gifts** shows all the gifts that have been posted to the fund. If a security is in the process of being transferred, it will not show on the Gift History until ACT has received the proceeds from the sale of the security.
- **Grants Paid** shows all approved grants for which a check has been cut and mailed. This information is usually posted to the site one or two days after the approval of the grant. If you have questions about the grant approval process, please contact our office.
- **Grants Pending** includes grants that have been recommended but not yet paid.
- **Grant Recommendation** section allows you to recommend grants by completing an online form and sending it electronically to ACT. Once submitted, an e-mail is sent to the fund advisor confirming the information he/she just submitted. This e-mail does not indicate that the grant has been approved, but that the recommendation has been submitted to ACT for approval. Grants are processed twice monthly.
- **My Profile** enables you to update and change your user profile in Donor Central
- **Other Advisors** provides the opportunity to e-mail all co-advisors to your fund for whom ACT has e-mail addresses.
- **Sign Off** for security purposes when you have concluded your work.

Please let us know if you have any questions regarding Donor Central or have trouble accessing your fund(s). \*\*\*Please also make sure that we always have your most current e-mail address and contact information. You may call our office at 518-523-9904 or email Andrea at [andrea@generousact.org](mailto:andrea@generousact.org). We hope you enjoy this service as much as we do!

Adirondack Community Trust  
PO Box 288, Lake Placid, New York. 12946  
T: 518-523-9904      F:518-523-9905

Encouraging Philanthropy to Serve the Adirondack Region.