Ren

Giving Platform Advisor User Guide

In this guide, you'll find everything you need to manage your clients' DAF accounts with confidence.

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Engagement Hub Overview

This page is advisor-facing only and is not visible to your clients.

Notifications

Find action items for your clients' accounts, including grant status and account applications, and know when documents are posted.

Quick Links

Most common actions front and center.

DAF Insights: Deeper dive of account performance and activity.

Recommend a Grant: Start a grant recommendation for your client easily .

Add a Contribution: Notify us of additional assets moved to the investment account.

Add an Account: Start an application with your and your teams information pre-filled.

News and Updates

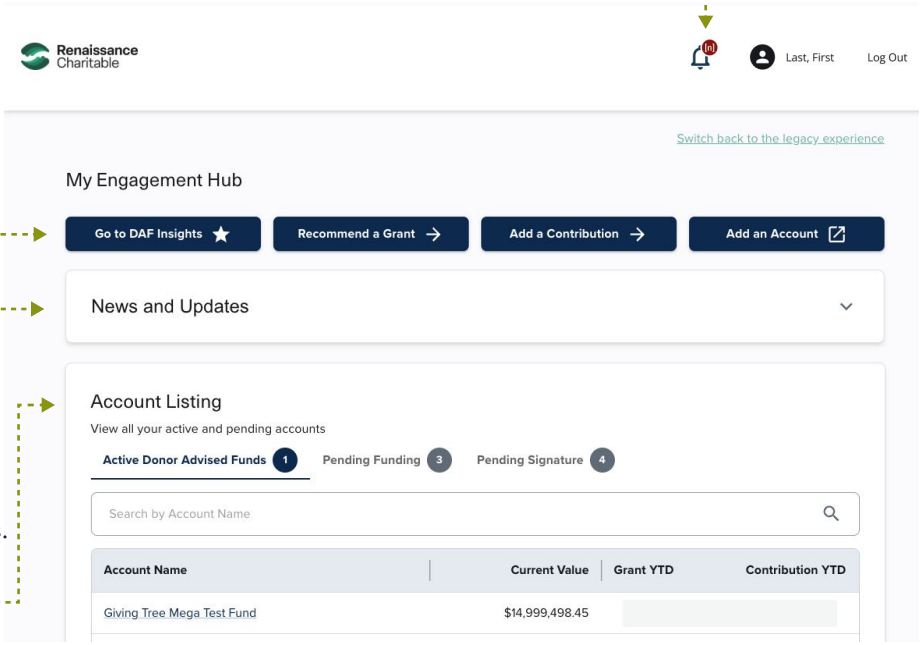
Expand to learn about the latest features and program updates. Usually updated every 1–2 months.

Account Listing

Find quick details of all your client's accounts, active or pending.

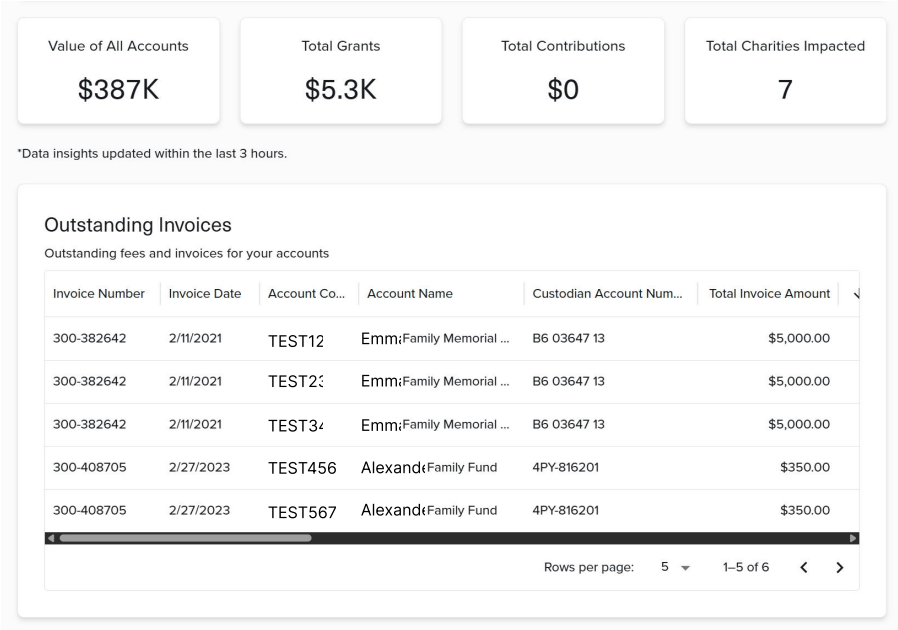
Active Donor Advised Funds: Shows accounts with a signed application, including current value and Grants and Contributions YTD.

Pending Signature and Funding: Shows accounts awaiting signature and then funding before its active grant-ready. From here you can access the account status page, which outlines the outstanding steps needed before the account is grant ready.



Portfolio Summary

All-time total across all your managed accounts.



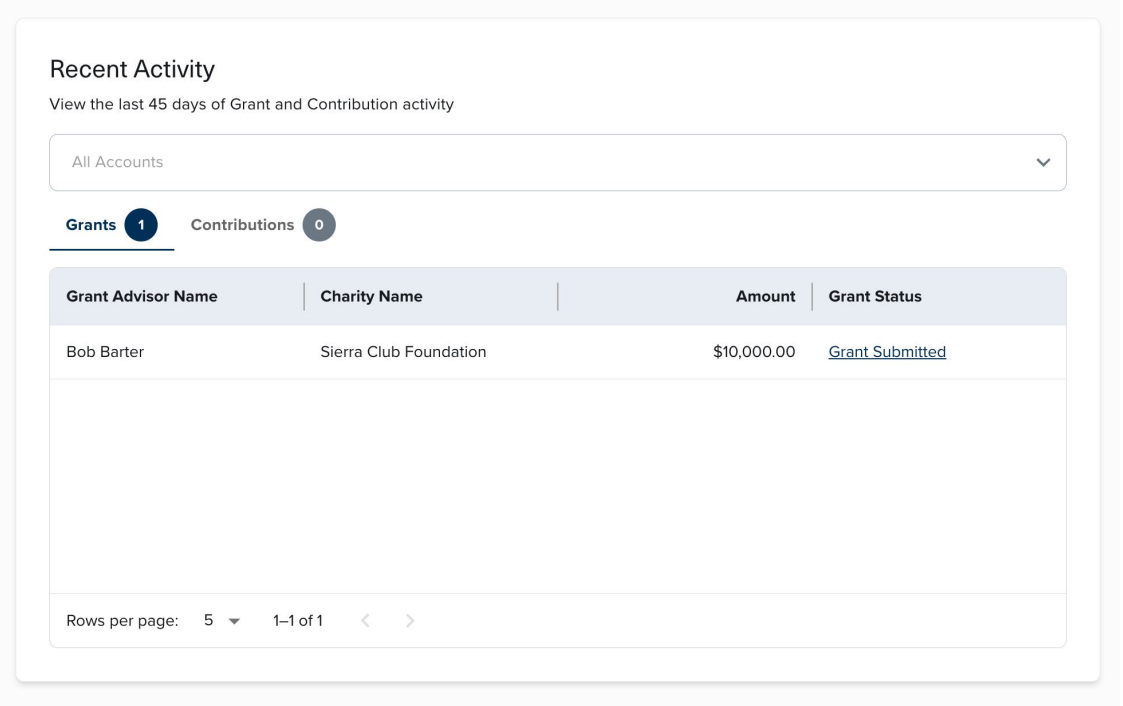
Outstanding Invoices

Find details on outstanding invoices for grants, admin fees, and other expenses. Scroll right to view payment instructions. You'll also receive an email notification when the invoice is created. Admin fees are quarterly, and grant invoices are generated once the grant passes vetting.

Engagement Hub Overview

Recent Activity

Recent grants and contributions from the last 45 days, all in one place. Click any grant's status to see full details and next steps.



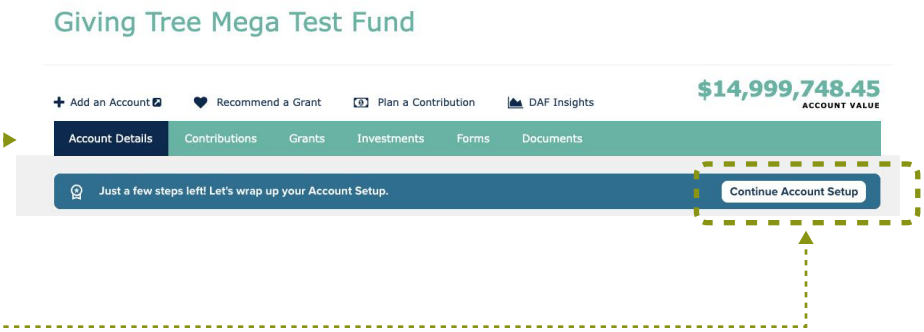
Ren

Finish Account Set Up

After the application is submitted, there are still outstanding details we need to ensure your account is finished and in good standing.

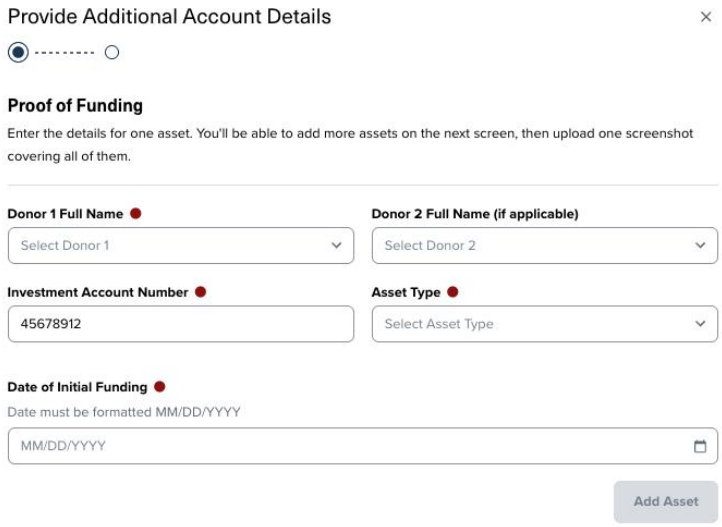
Account Details

From the Account Listing section in the Engagement Hub, select the account to go to its Account Details page. Then select the **Continue Account Setup** banner.



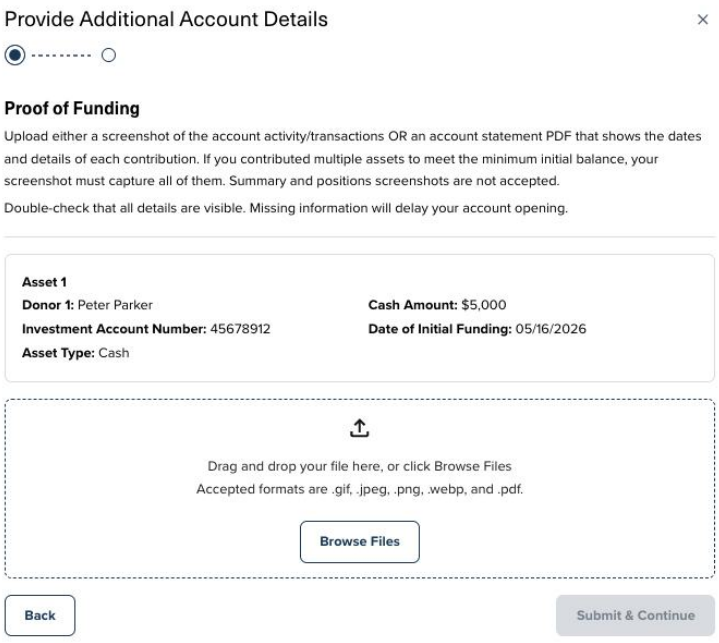
Submit Proof of Funding

Enter details on the initial funding to meet the minimum balance: donor, asset type, and date of funding.



Upload Image

Upload either a screenshot of the account activity or an account statement PDF. It must include the date of funding, asset type, and investment account number. Summary and positions pages are not accepted. Uploads are secure in the system.



Ren

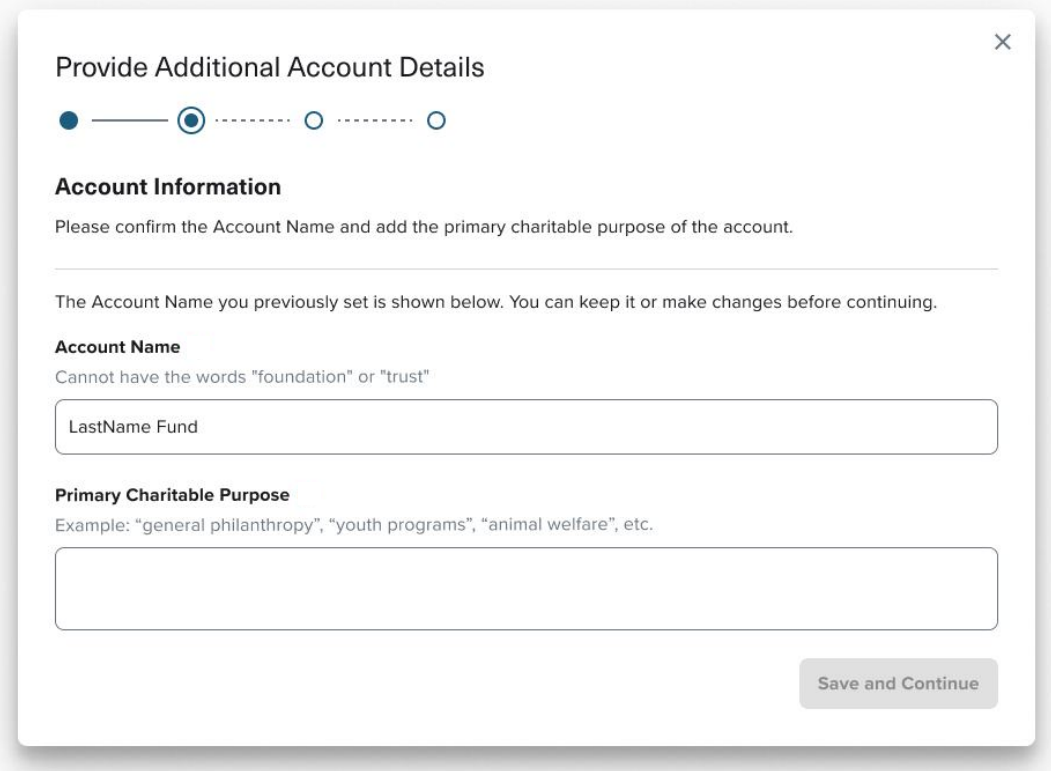
Finish Account Set Up

Confirm Account Name

Confirm the account name shown, which is pulled from the application. Edit if needed.

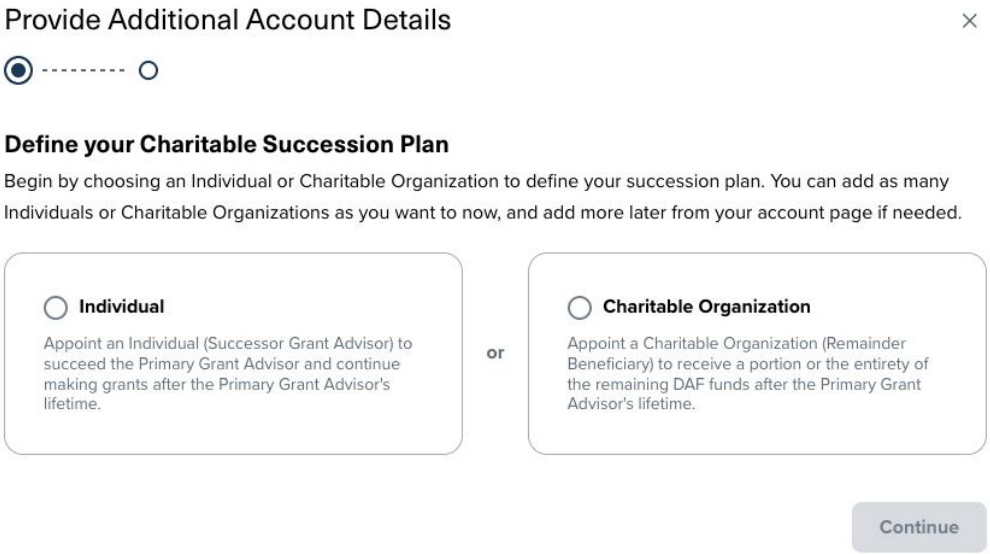
Enter Charitable Purpose

Describe the charitable purpose of this account. If no remainder beneficiaries or grant successors are named, this guides how we honor your intent for the account.



Define your Charitable Succession Plan

Choose an individual or charitable organization as the successor. Additional screens will follow based on your selection.



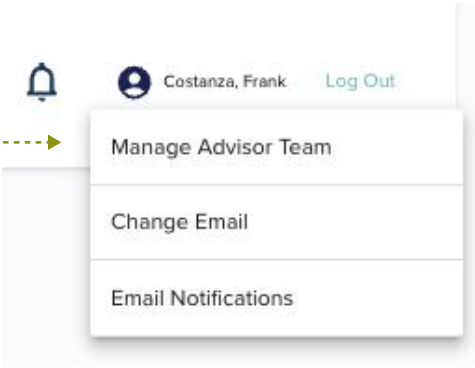
Managing Roles After Account Opening

If there is a change or addition to advisors or donors, you can enter it directly in the platform.

For Existing Advisor(s)

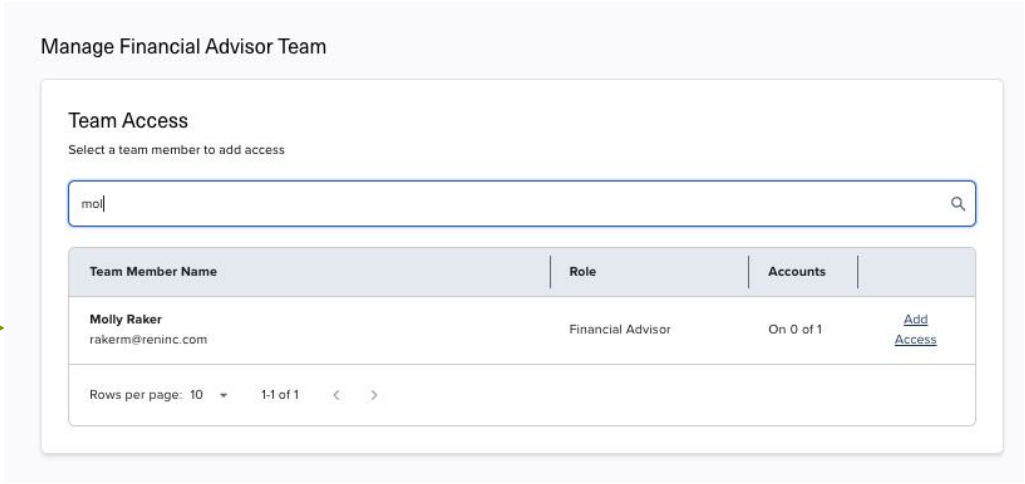
Manage Advisor Team

Go to your name in the upper right-hand corner and select Manage Advisor Team.



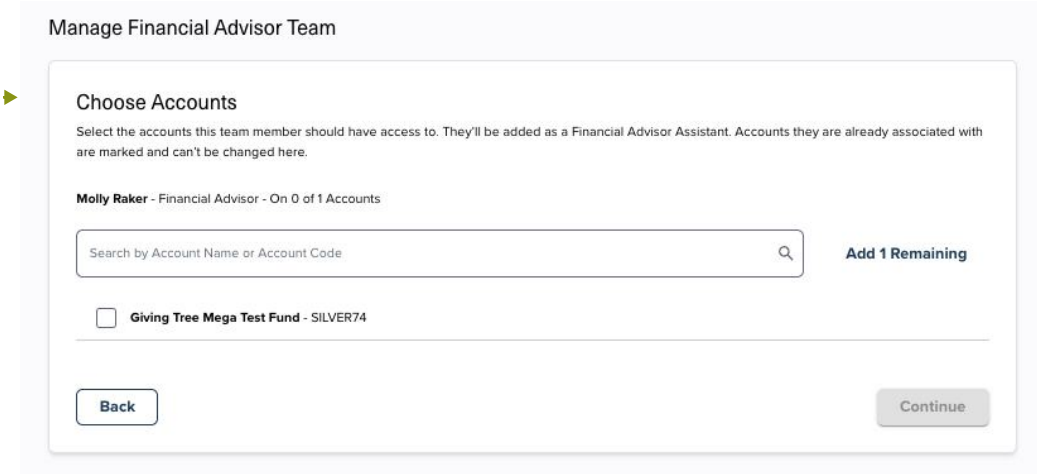
Choose Advisors

Choose from the list of advisors that are on other accounts of yours or search by name. You can see how many accounts they are on with you.



Choose the accounts

Once you select a name, choose which accounts you want them on.

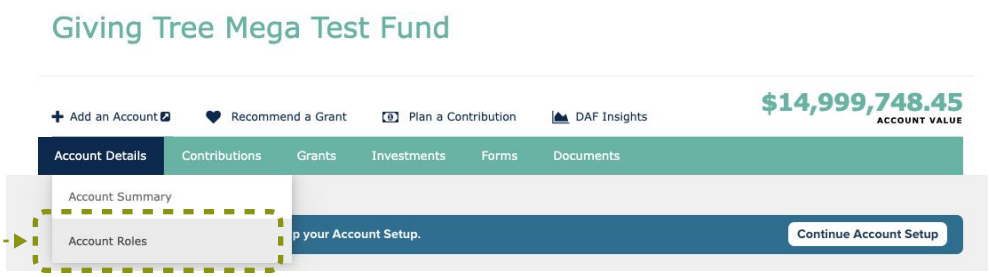


Managing Roles After Account Opening

For New Donors and Advisors

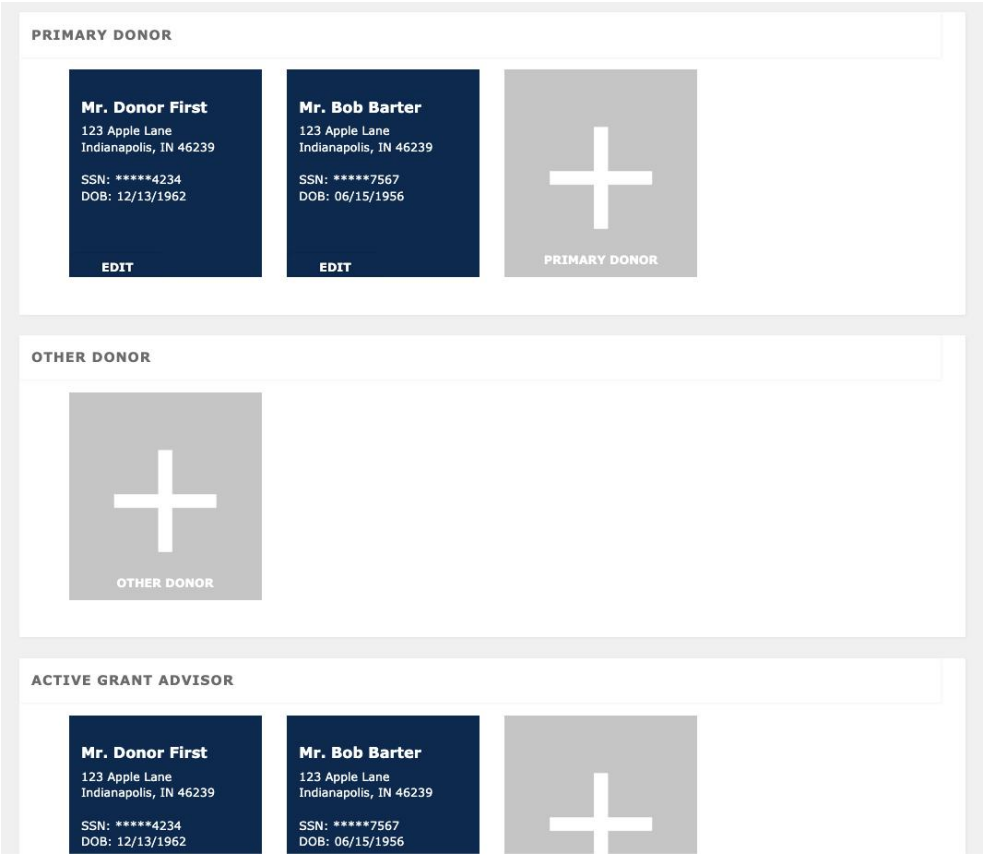
Find Account Roles

From the Account Listing section in the Engagement Hub, select the account to go to its Account Details page. Then click **Account Details** in the menu, then **Account Roles**.

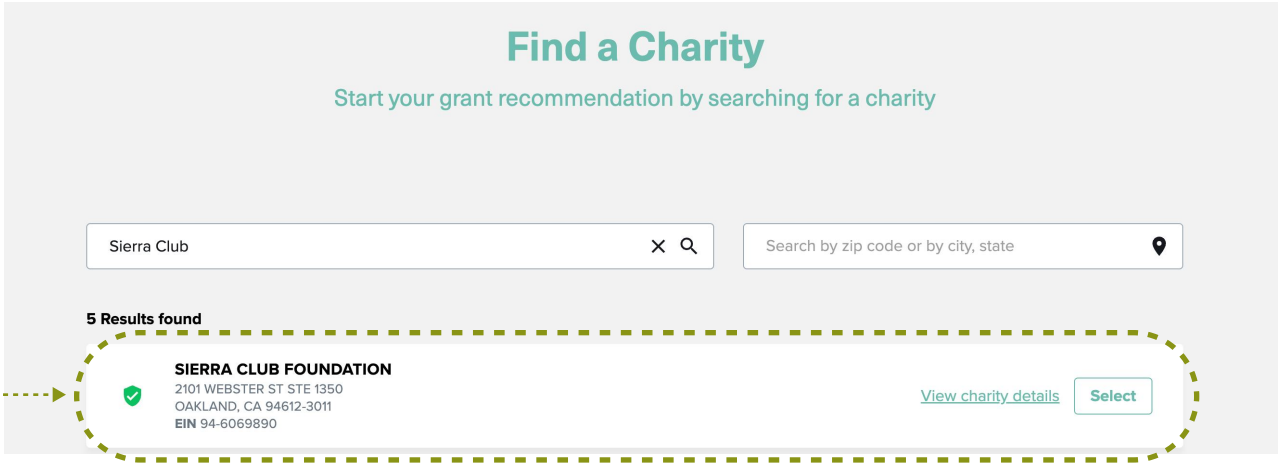


Manage Account Roles

Add, edit, or remove Grant Advisors, Successor Grant Advisors, Financial Advisors, or Interested Parties. Donors can be edited, but not added or removed. Removal requires a death certificate to be processed.

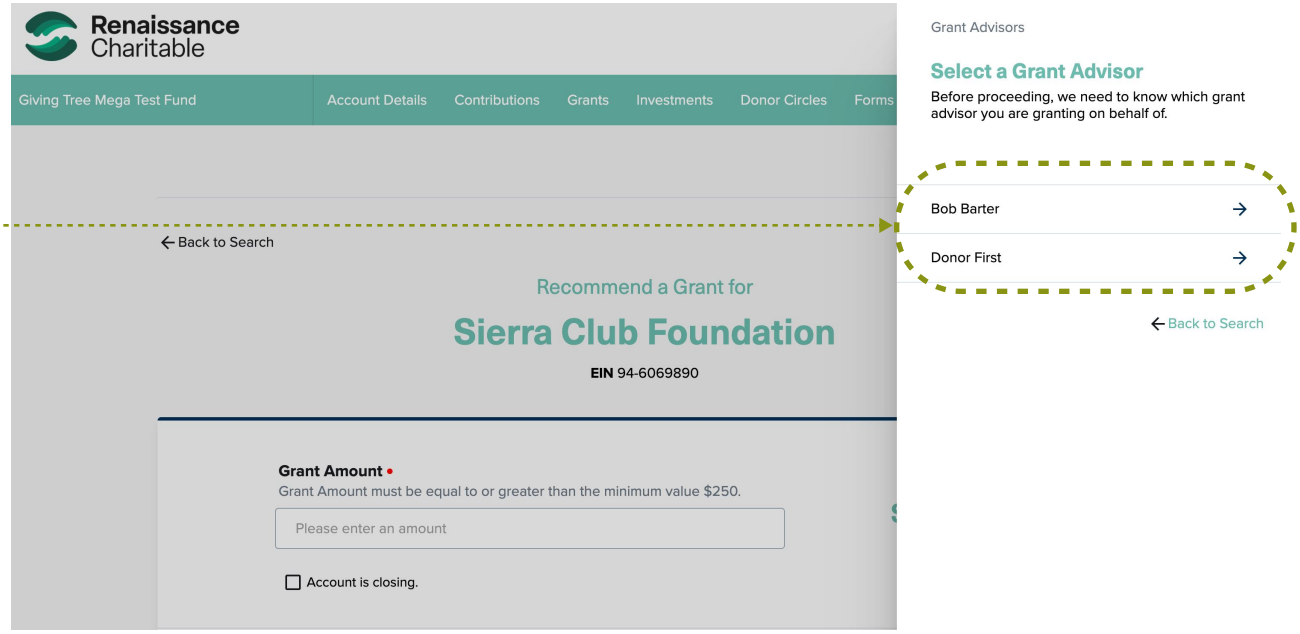


How to Recommend a Grant



Find a Charity

After selecting Recommend a Grant, you will need to search for the Charity by name, EIN or geographic location.



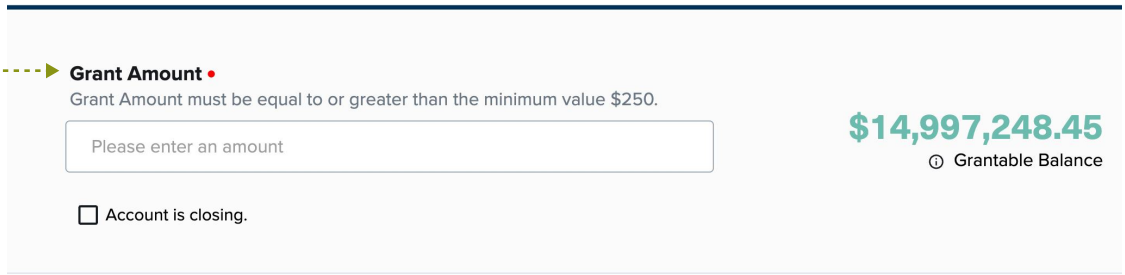
Select a Grant Advisor

Choose a Grant Advisor making this recommendation. If the person is not listed, you'll need to add them under Roles in the Account Details.

How to Recommend a Grant

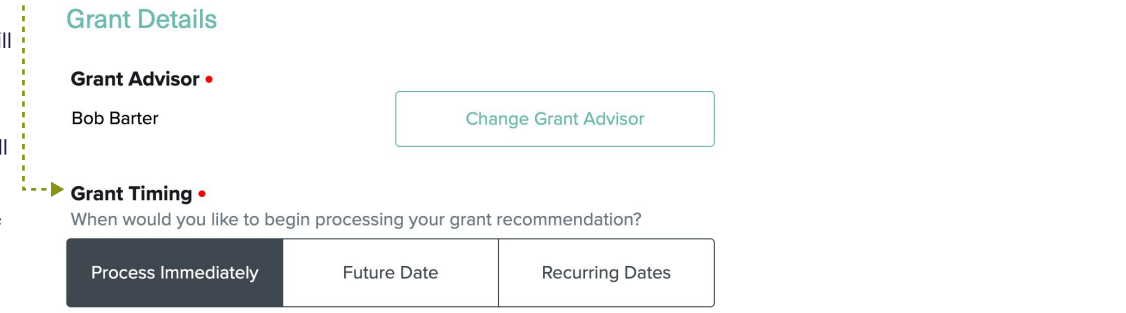
Grant Amount

The available grantable balance and the minimum grant amount are displayed for your convenience.



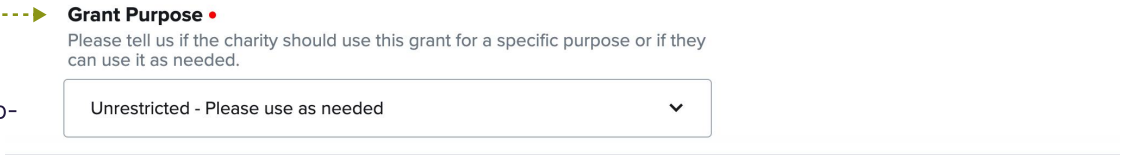
Grant Timing

You have three timing options:
Process Immediately: the grant will go directly into processing.
Future Date: Must be at least 30 days out and the date reflects the start of vetting, not when funds will arrive at the charity.
Recurring: Each recurring date represents when the processing of that grant will begin.



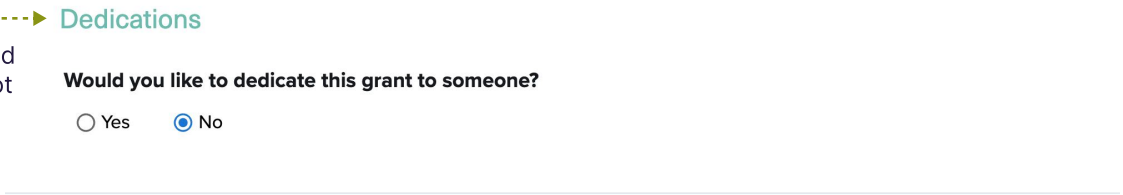
Grant Purpose

Tell the charity how the funds should be used. By default, it's unrestricted, but there is a drop-down list of options to choose from or fill in.



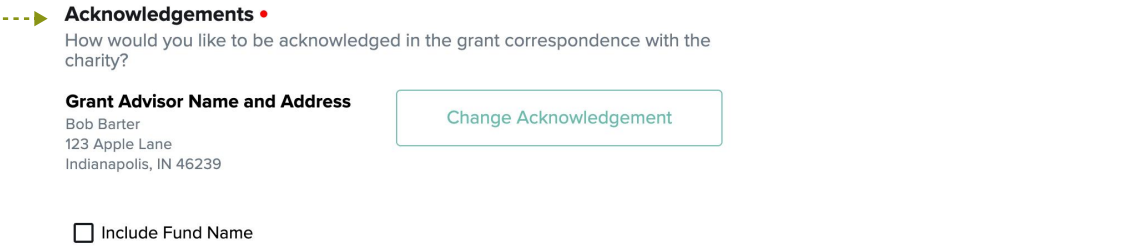
Dedications

Indicate if the grant is dedicated to someone. Note: Ren does not send any notification to the person being honored; this is only visible to the charity.



Acknowledgements

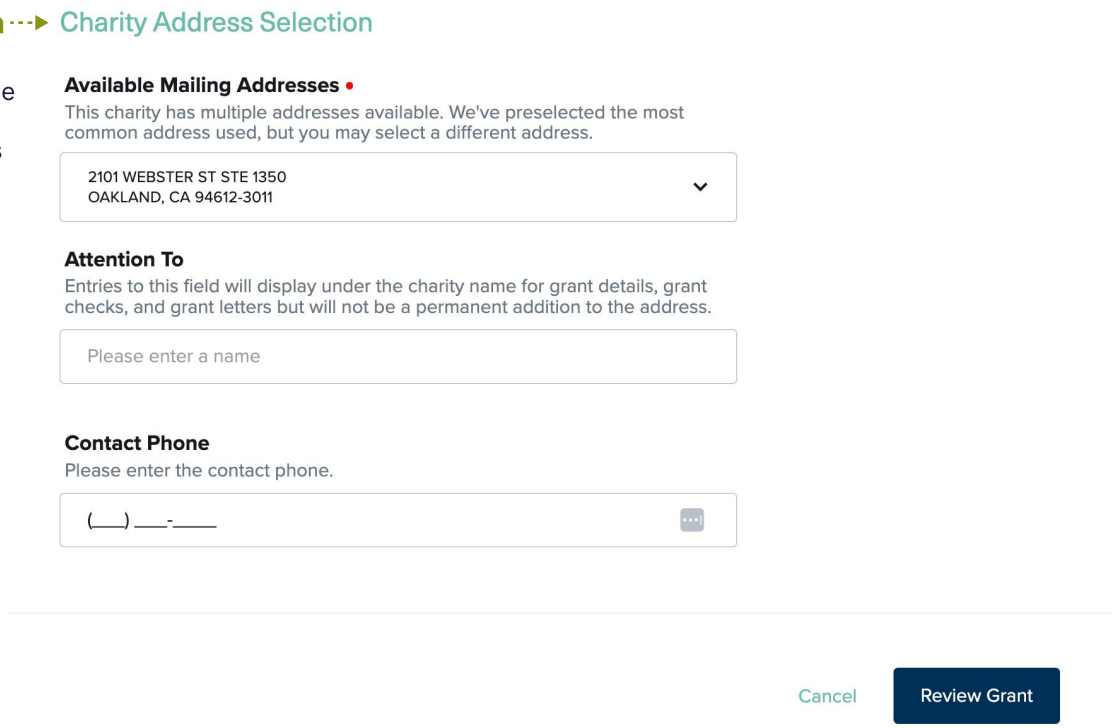
Specify what information the charity sees when they receive the grant. By default, this includes the grant advisor's name, email, and address, but you can customize it to show only your name, fund name, and address, or remain anonymous.



How to Recommend a Grant

Charity Address Selection

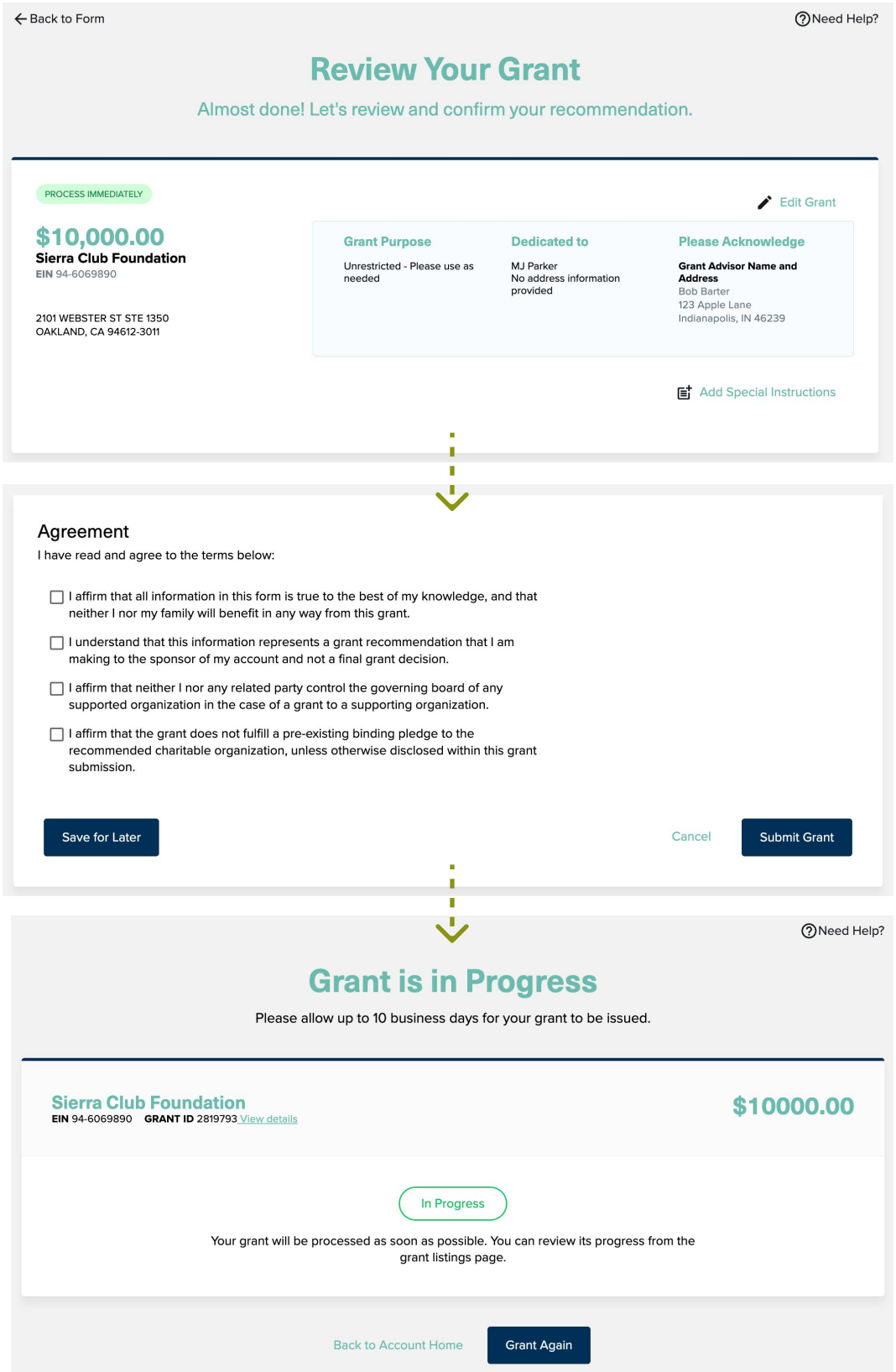
If you enter an address that isn't in the dropdown, it will need to be verified, which may add some processing time. The other fields are optional and allow you to share a charity's contact information, if you choose.



Ren

Review Your Grant

Review the details to ensure accuracy before submitting for processing.



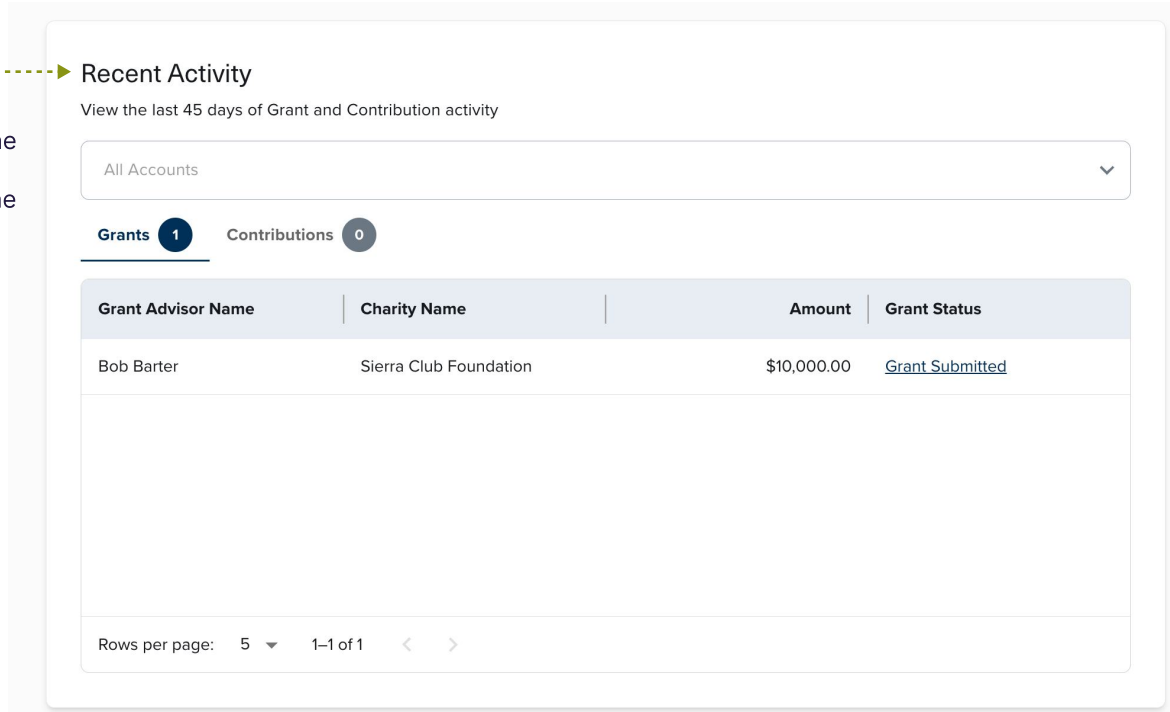
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Track Your Client's Grant

Track your client's grant progress anytime on your homepage (Engagement Hub), in the Recent Activity section at the bottom. You'll also receive email alerts at key milestones: submission, awaiting funding, approval (when funds are received), and when the charity's bank receives the funds.

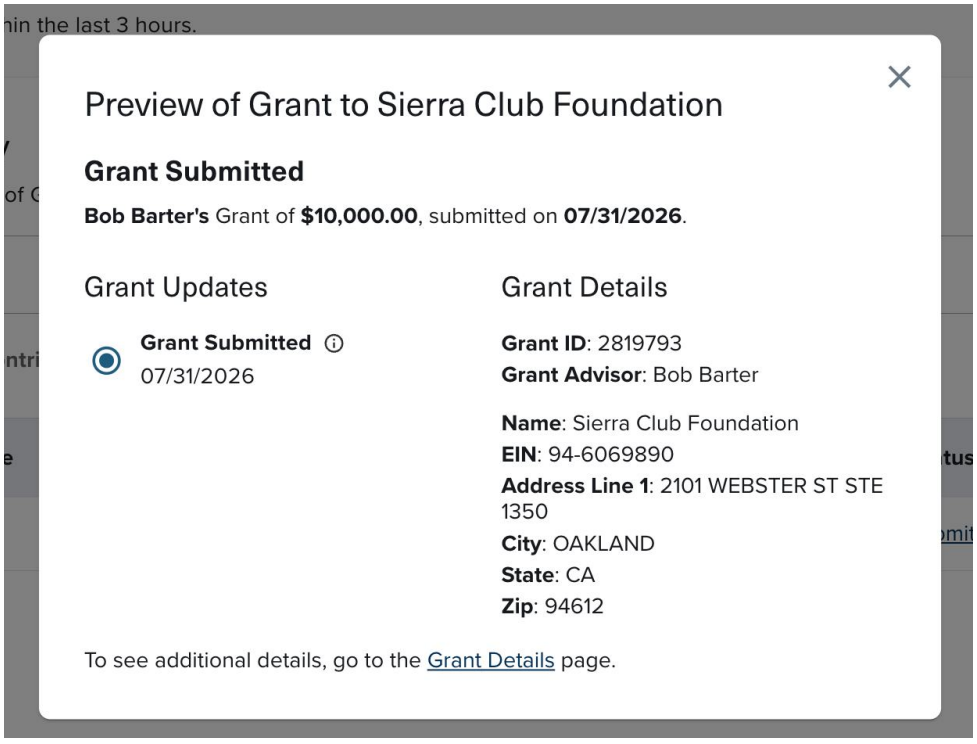
Recent Activity

Scroll down to the Recent Activity section and click the status column. This column shows the current status the grant is in.



Grant Tracker

The status tracker displays the current status, along with the four most recent status changes and associated grant details.

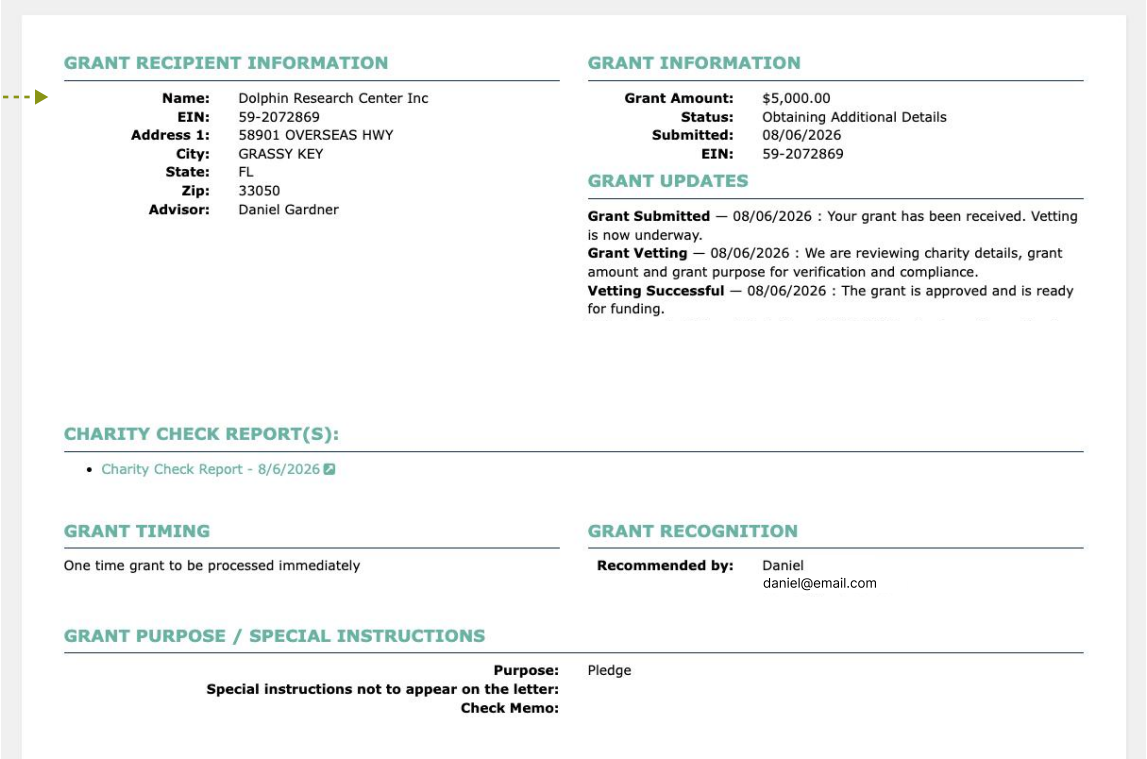


Ren

Track Your Client's Grant

Grant Details

The information on this page showcases key status updates and information that will appear on the charity's grant letter, like recognition and purpose. "Payment Received" indicates that funds have been received by the charity's bank.



GRANT RECIPIENT INFORMATION

Name: Dolphin Research Center Inc
EIN: 59-2072869
Address 1: 58901 OVERSEAS HWY
City: GRASSY KEY
State: FL
Zip: 33050
Advisor: Daniel Gardner

GRANT INFORMATION

Grant Amount: $5,000.00
Status: Obtaining Additional Details
Submitted: 08/06/2026
EIN: 59-2072869

GRANT UPDATES

Grant Submitted — 08/06/2026 : Your grant has been received. Vetting is now underway.
Grant Vetting — 08/06/2026 : We are reviewing charity details, grant amount and grant purpose for verification and compliance.
Vetting Successful — 08/06/2026 : The grant is approved and is ready for funding.

CHARITY CHECK REPORT(S):

- Charity Check Report - 8/6/2026

GRANT TIMING

One time grant to be processed immediately

GRANT RECOGNITION

Recommended by: Daniel
daniel@email.com

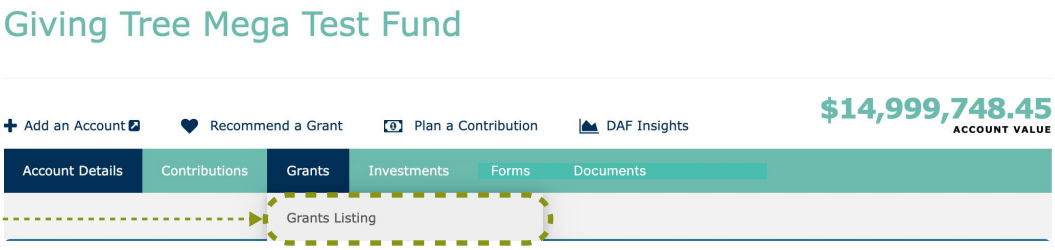
GRANT PURPOSE / SPECIAL INSTRUCTIONS

Purpose: Pledge
Special instructions not to appear on the letter:
Check Memo:

How Clients Track their Grant Status

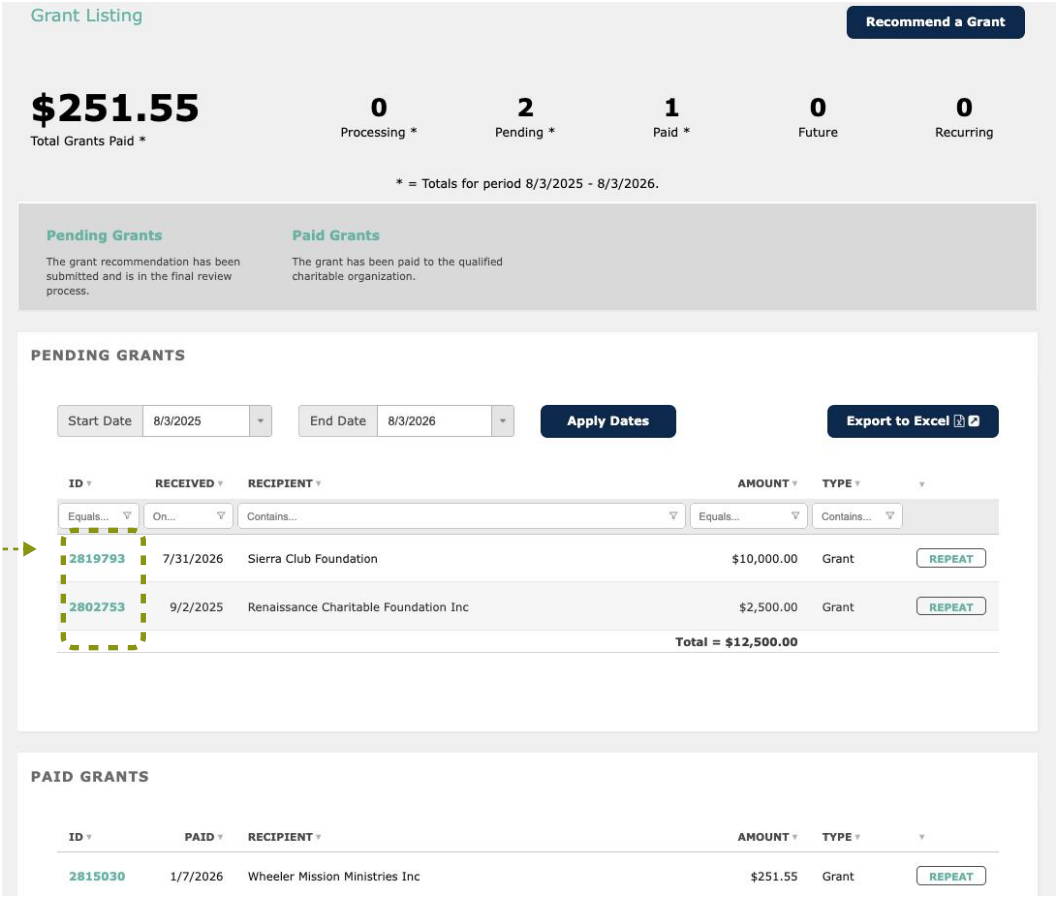
Grants

After logging in, your clients land on the account details page. To check their grant status, they'll go to **Grants** > **Grants Listing** in the menu bar.



Grants Listing

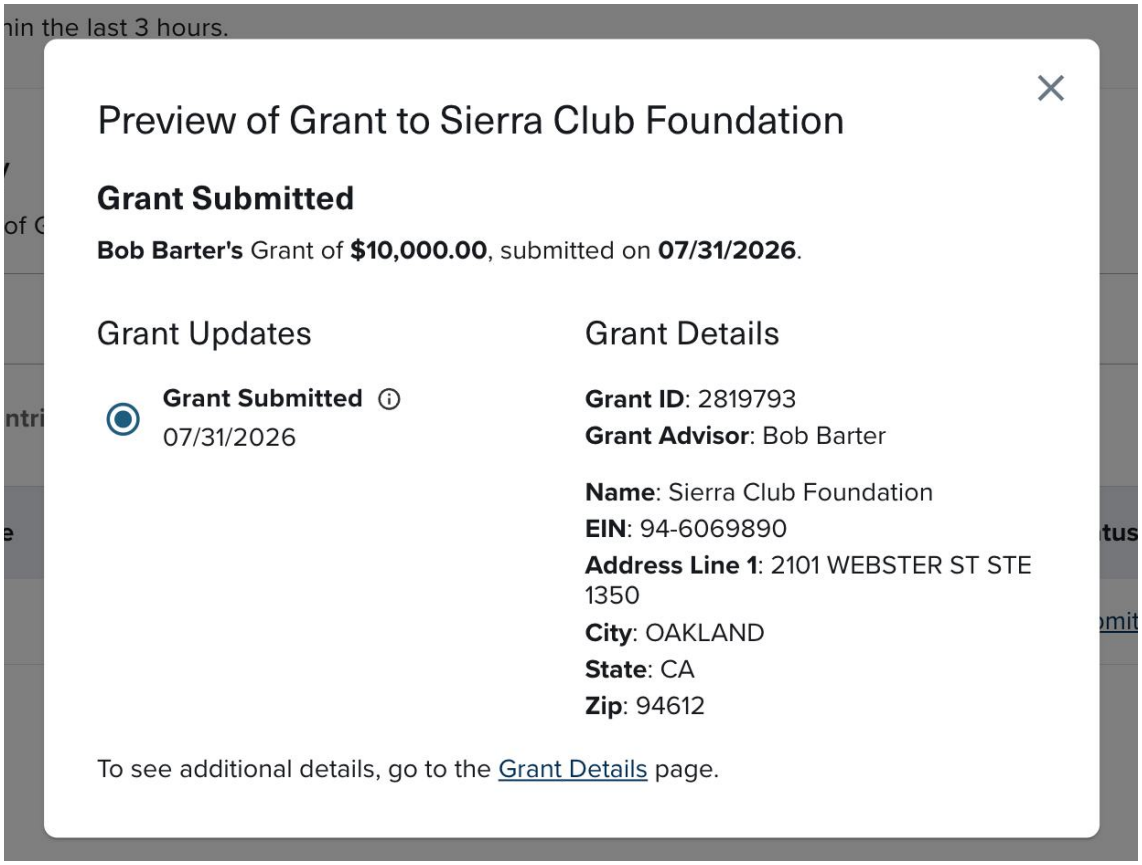
Here you will find a list of all grants associated with the account, organized by Pending, Paid, and Recurring. Click the ID to showcase the grant tracker. Note: If you are looking at Recurring grants, be sure to filter by STATUS to see all the OPEN ones.



How Clients Track their Grant Status

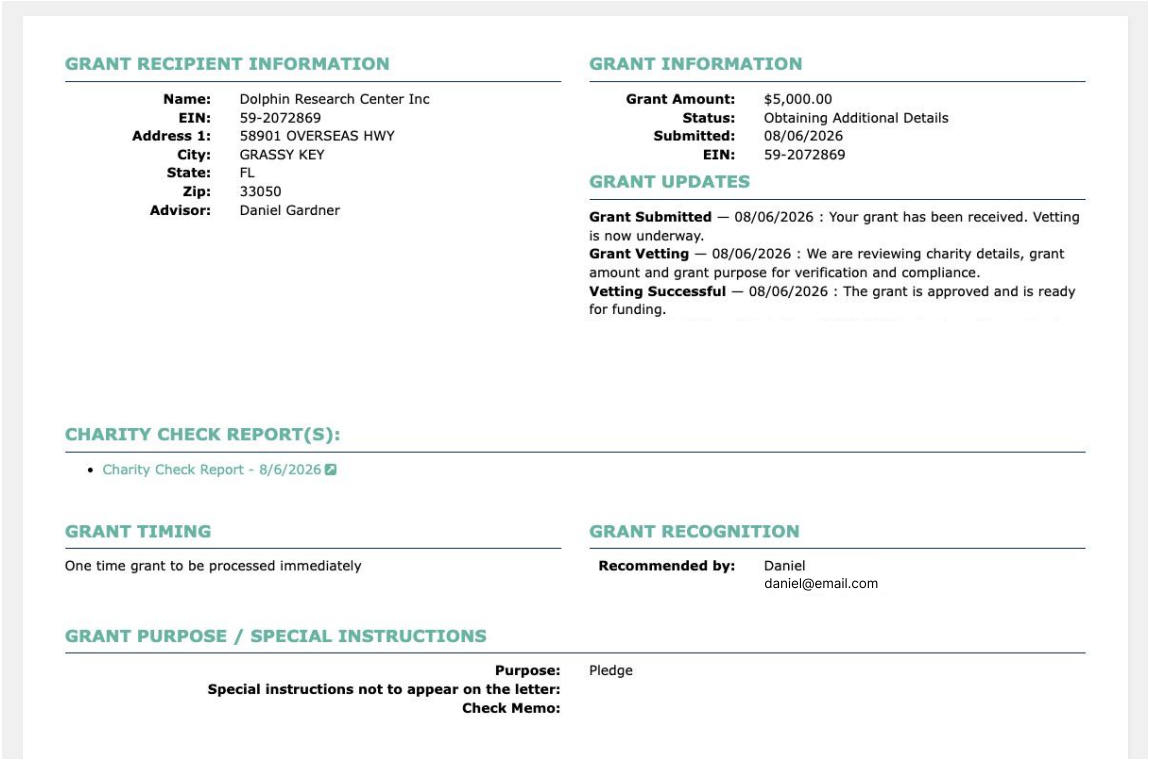
Grant Tracker

Upon clicking the Grant ID number, the grant tracker will pop-up.



Grant Details

The information on this page showcases key status updates and information that will appear on the charity's grant letter, like recognition and purpose. "Payment Received" indicates that funds have been received by the charity's bank.

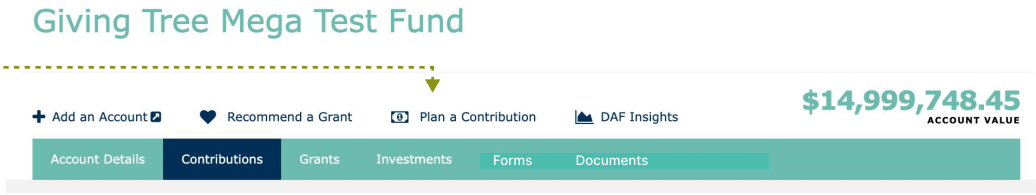


Add a Contribution

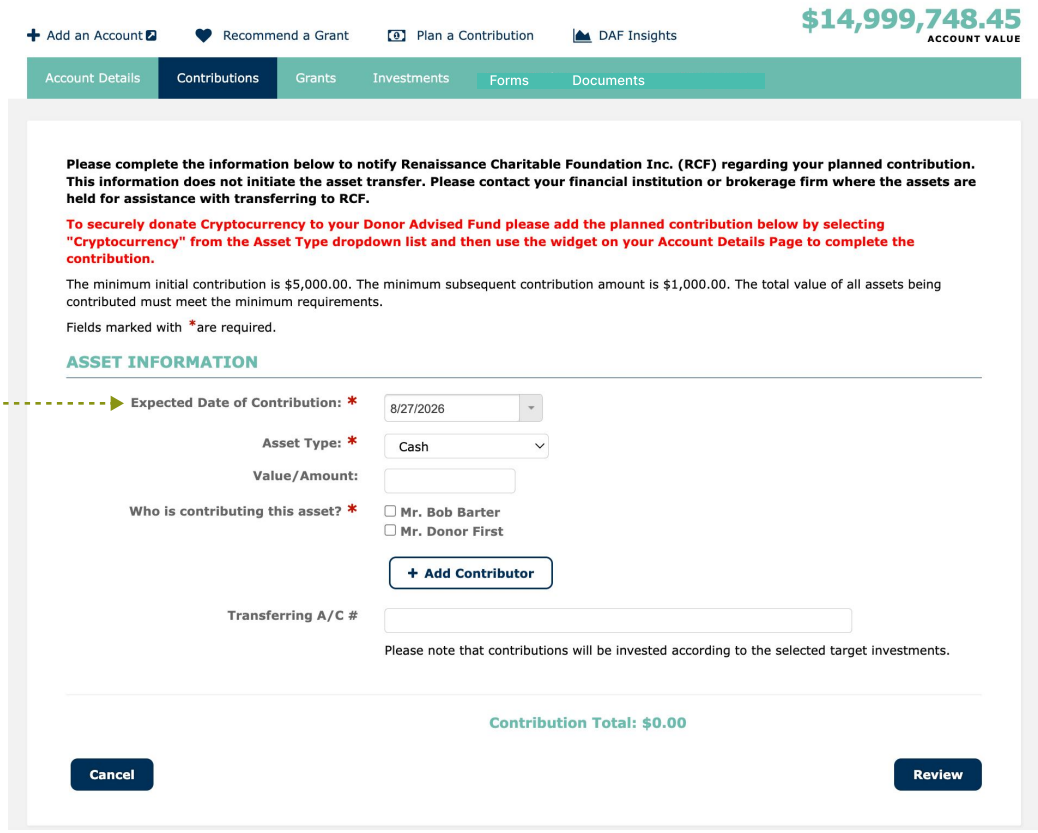
You must notify Ren of any additional contributions made or expected after your client's account is opened. This ensures the balance is reflected accurately and helps avoid delays in granting.

Don't rely on the firm's investment account for this information. Your minimum contribution amount is shown on this page.

Access this page from your Engagement Hub by selecting Add a Contribution, or from the specific account's Account Details page by selecting Plan a Contribution.

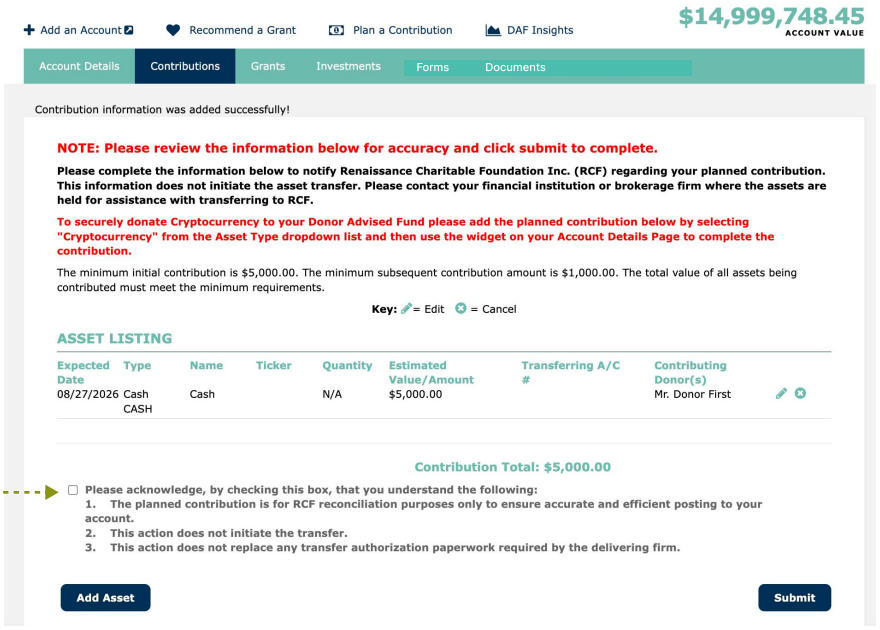


Enter the contribution date, asset type, and contributor, then select Review.



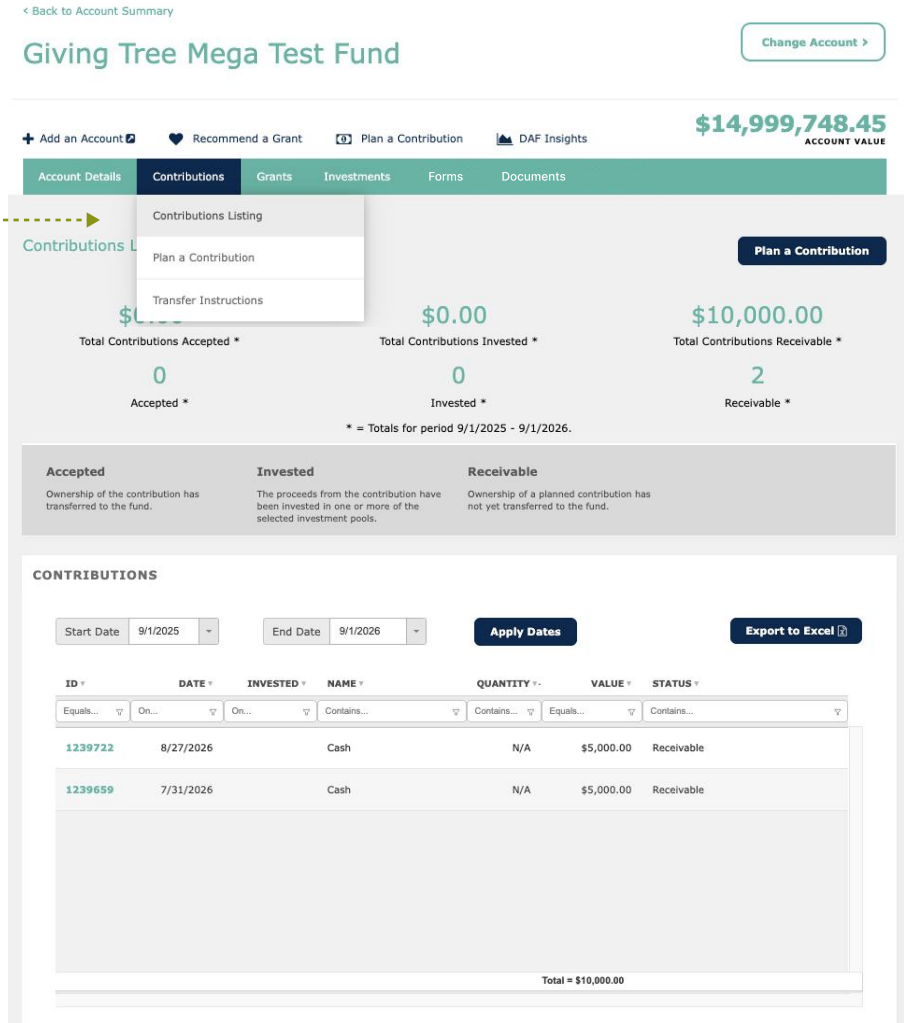
Add a Contribution

Review and acknowledge the details of this action.

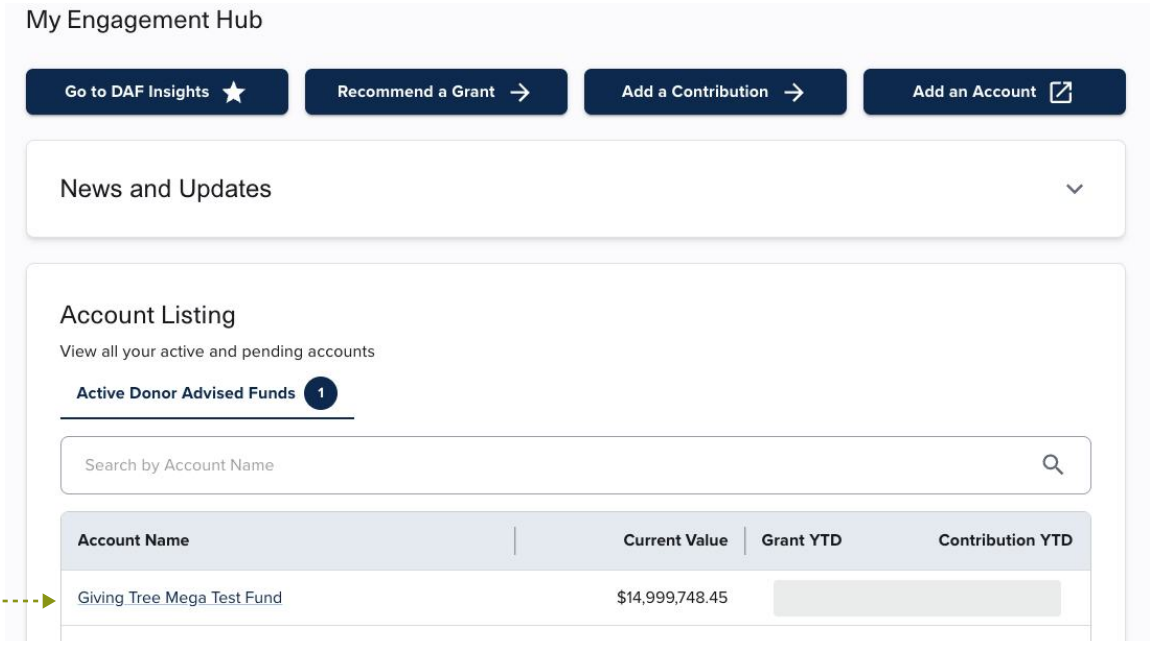


Contribution Listing

View all the contributions to the account.



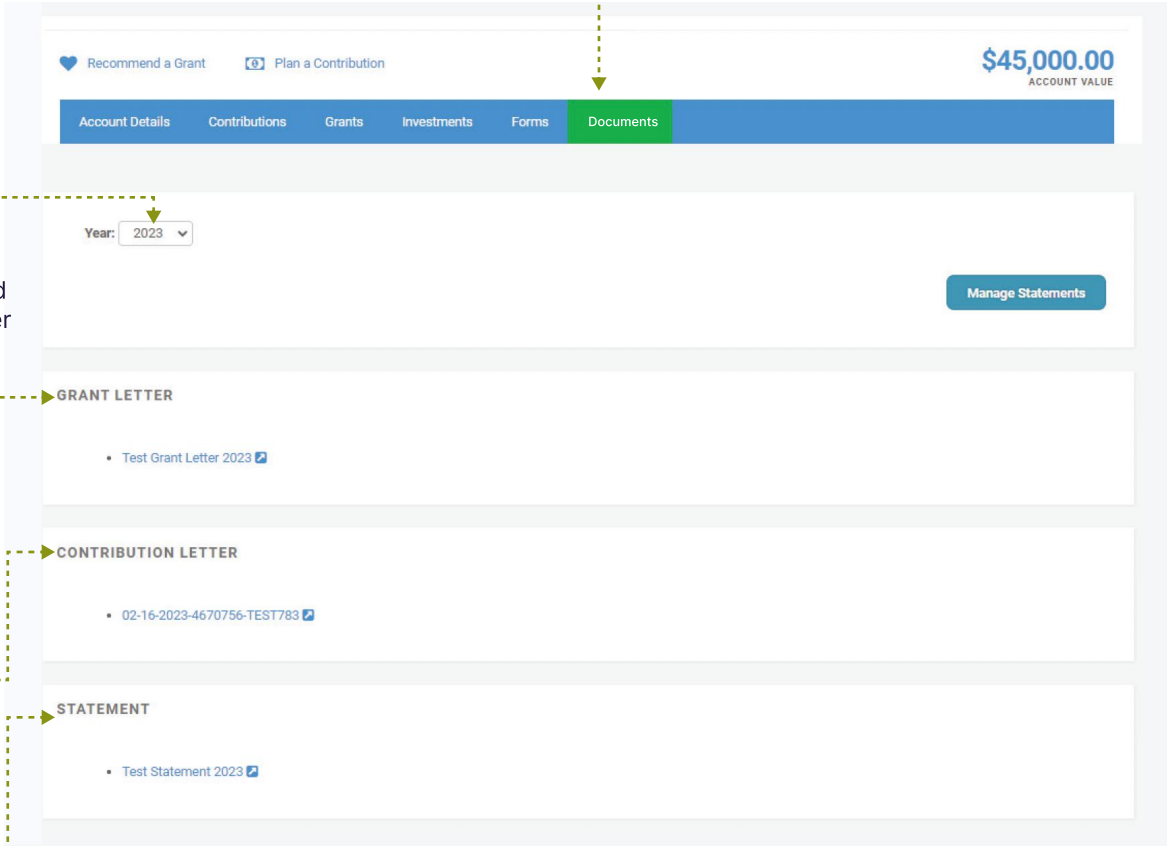
How to Get Contribution Letters and Statements



First, select the Account you want from the Account Listing on the Homepage.

Statements tab

Clicking the Statements tab will take you to where you can find grant letters, contribution letters and account statements.



Year

Filters documents by the year they were generated. Example: a 2026 generated contribution letter will cover 2025 contributions.

Grant letter

View grant letters sent to charities with processed grants. *Please note, if the grant is sent to the organization electronically, no grant letter will be generated.*

Contribution letter

Contribution letters can be used to supplement your tax preparation.

Statements

View quarterly statements for the account.

Understanding Your Account Statement

Date
Date shows the quarter to which the statement applies.

Fund information
Fund information shows the name of the fund, the fund's code, and the fund's account number.

Account summary
Account summary shows the balance of the account at opening and close of the statement's quarter.

Account holdings
Account holdings provides a breakdown of the beginning and ending balances for underlying investments within the fund.

Contributions to account
A detailed listing of contributions and grants within the account during the quarter is shown in "Contributions to Account" and "Grants from Account."

Account Statement

January 1, 2023 - March 31, 2023

Special Giving Fund Account
Code: TEST178
Account Number: 12345

Renaissance Charitable Foundation Inc*
8888 Keystone Crossing Ste 1222
Indianapolis, IN 46240

To access your online account information, visit us @ https://xyz.donorfirstx.com.

Account Summary

Beginning Balance (January 1, 2023)	**$772,804.06**
Contributions to Account	$13,781.00
Grants Paid from Account	($10,000.00)
Market Value Changes	$13,288.85
Interest and Dividends	$0.00
Realized Gains (Losses)	$0.00
Account Fees	$0.00
Ending Balance (March 31, 2023)	**$789,873.91**

Account Holdings

Description	Beginning Balance	Change in Account Balance	Ending Balance	% of Account
Stock #1	$295,477.42	$0.00	$295,477.42	38.07%
Stock #2	$477,326.64	$3,288.85	$480,615.49	61.93%
Total	**$772,804.06**	**$3,288.85**	**$776,092.91**	**100.00%**

Contributions to Account

Date Received	Description	Quanity	Amount
03/02/2023	Stock #1	200.00	$13,781.00
Total			**$13,781.00**

This is our standard template. Your actual statement's layout may vary.

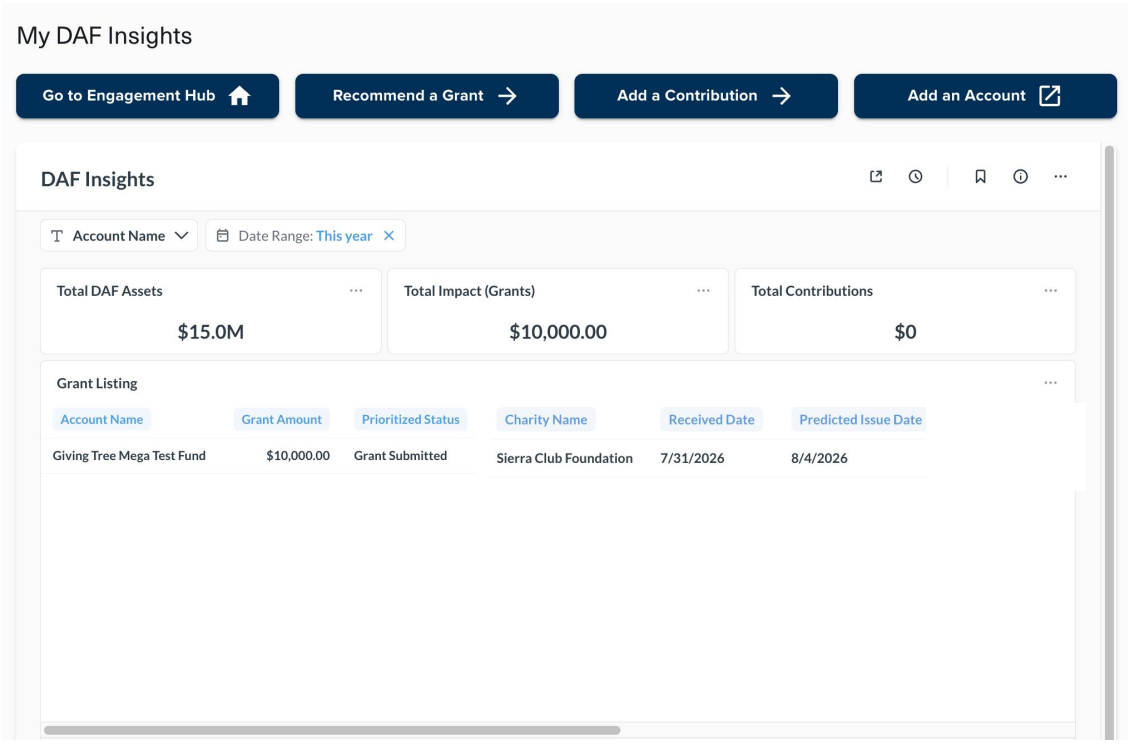
DAF Insights

DAF Insights

Select a date range to update all information on this page, and filter by a specific account if needed.

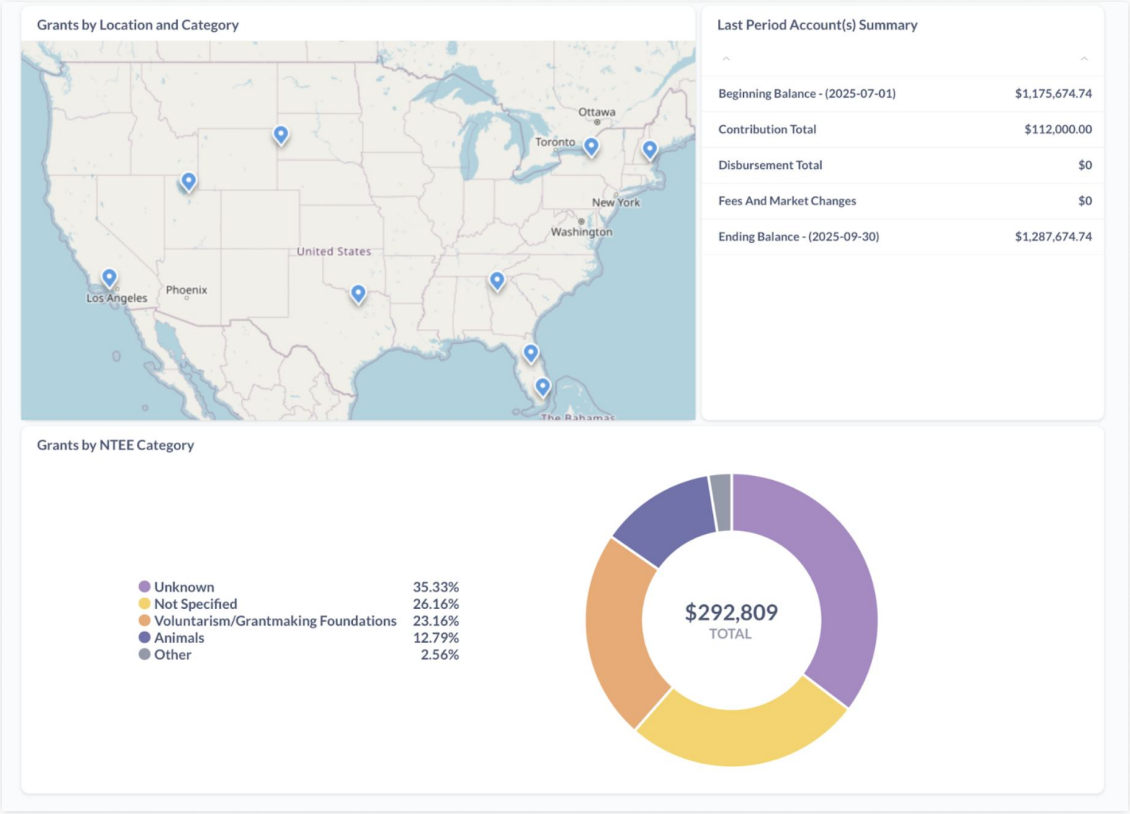
Grant Listing

Lists all grants active or completed, including important details like payment type (scroll right).



Grant Location and Category

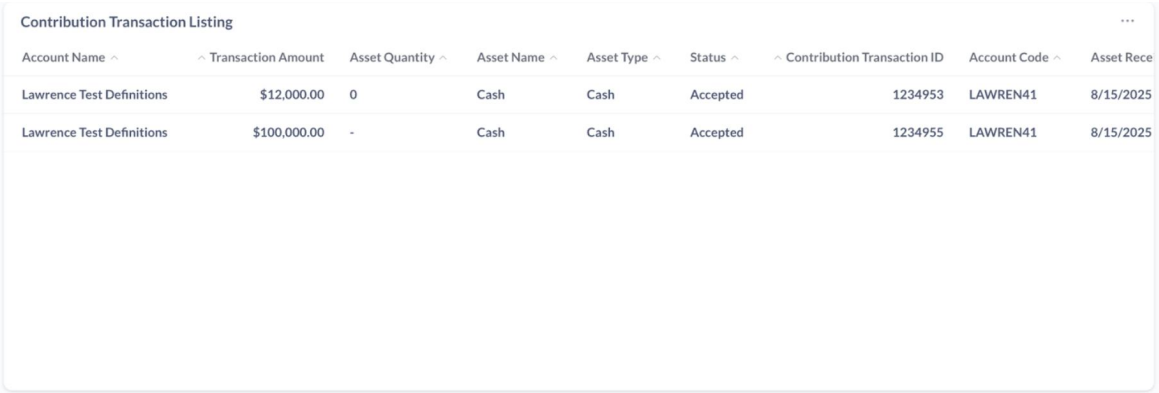
View where your clients are sending grants and in what categories to inform future recommendations.



DAF Insights

Contribution Listing

View all contributions across your managed accounts and their statuses.



Asset Type

View your clients' portfolio asset types.

