

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.

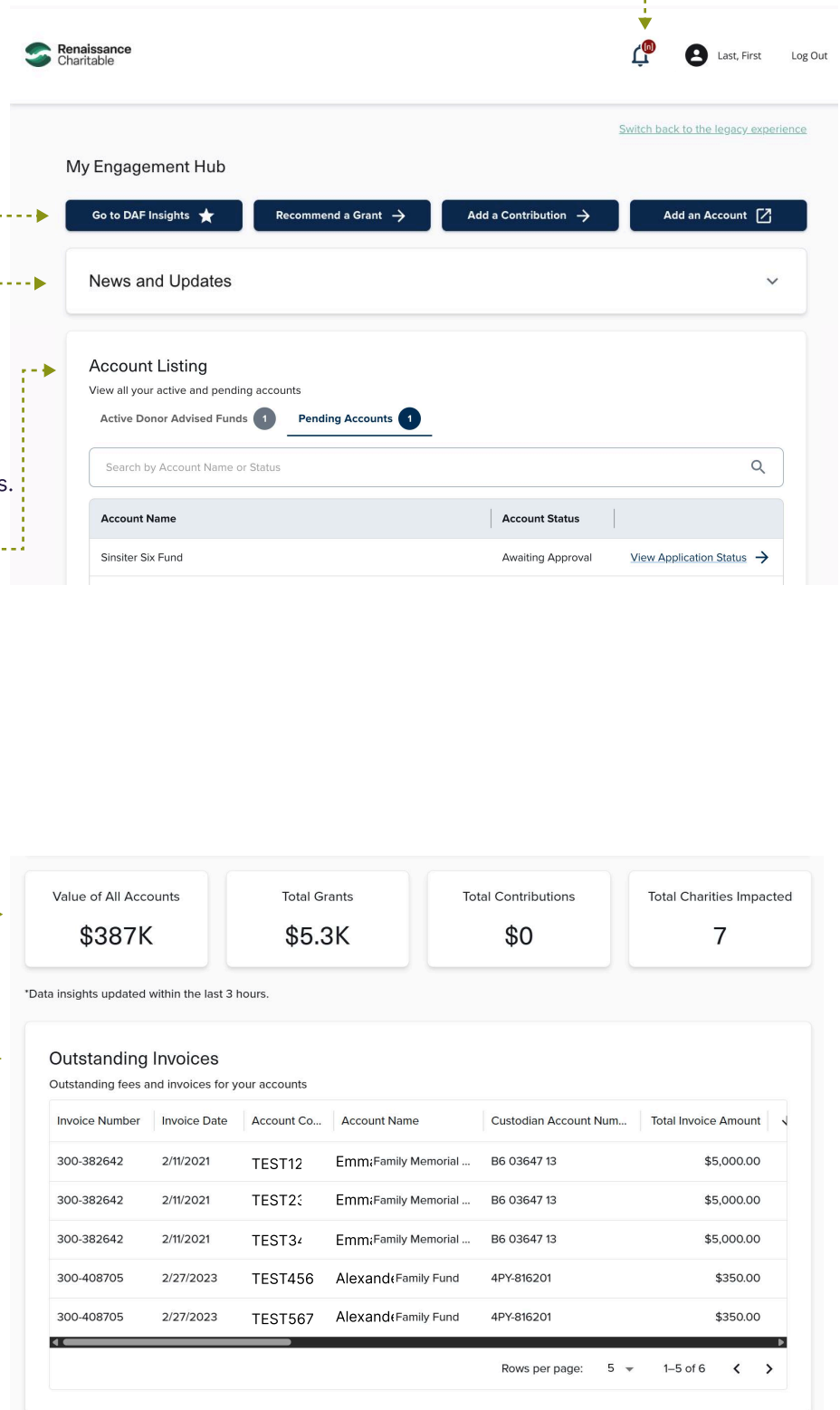
Pending Accounts: Shows accounts awaiting signature. From here you can access the account status page, which outlines the outstanding steps needed before the account is grant ready.

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.



My Engagement Hub

[Go to DAF Insights](#) [Recommend a Grant](#) [Add a Contribution](#) [Add an Account](#)

News and Updates

Account Listing
View all your active and pending accounts

Active Donor Advised Funds 1 Pending Accounts 1

Search by Account Name or Status

Account Name	Account Status	
Sinsiter Six Fund	Awaiting Approval	View Application Status

Portfolio Summary

Value of All Accounts	Total Grants	Total Contributions	Total Charities Impacted
\$387K	\$5.3K	\$0	7

*Data insights updated within the last 3 hours.

Outstanding Invoices
Outstanding fees and invoices for your accounts

Invoice Number	Invoice Date	Account Co...	Account Name	Custodian Account Num...	Total Invoice Amount
300-382642	2/11/2021	TEST12	Emm;Family Memorial ...	B6 03647 13	\$5,000.00
300-382642	2/11/2021	TEST22	Emm;Family Memorial ...	B6 03647 13	\$5,000.00
300-382642	2/11/2021	TEST34	Emm;Family Memorial ...	B6 03647 13	\$5,000.00
300-408705	2/27/2023	TEST456	Alexand;Family Fund	4PY-816201	\$350.00
300-408705	2/27/2023	TEST567	Alexand;Family Fund	4PY-816201	\$350.00

Rows per page: 5 1-5 of 6

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.

Recent Activity

View the last 45 days of Grant and Contribution activity

All Accounts

Grants

1

Contributions

0

Grant Advisor Name	Charity Name	Amount	Grant Status
Bob Barter	Sierra Club Foundation	\$10,000.00	Grant Submitted
Rows per page: 5 1-1 of 1			

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.

Giving Tree Mega Test Fund

[+ Add an Account](#)
[♥ Recommend a Grant](#)
[📅 Plan a Contribution](#)
[📊 DAF Insights](#)
\$14,999,748.45
ACCOUNT VALUE

[Account Details](#)
[Contributions](#)
[Grants](#)
[Investments](#)
[Forms](#)
[Documents](#)

Just a few steps left! Let's wrap up your Account Setup.
Continue Account Setup

Submit Proof of Funding

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

Provide Additional Account Details

☒ **Proof of Funding** ☐

Proof of Funding

Enter the details for one asset. You'll be able to add more assets on the next screen, then upload one screenshot covering all of them.

Donor 1 Full Name ●
Donor 2 Full Name (if applicable)

Investment Account Number ●
Asset Type ●

Date of Initial Funding ●
Date must be formatted MM/DD/YYYY

[Add Asset](#)

Provide Additional Account Details

☒ **Proof of Funding** ☐

Proof of Funding

Upload either a screenshot of the account activity/transactions OR an account statement PDF that shows the dates and details of each contribution. If you contributed multiple assets to meet the minimum initial balance, your screenshot must capture all of them. Summary and positions screenshots are not accepted. Double-check that all details are visible. Missing information will delay your account opening.

Asset 1
Donor 1: Peter Parker **Cash Amount:** \$5,000
Investment Account Number: 45678912 **Date of Initial Funding:** 05/16/2026
Asset Type: Cash

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.


 Drag and drop your file here, or click Browse Files
Accepted formats are .gif, .jpeg, .png, .webp, and .pdf.
[Browse Files](#)

[Back](#)
[Submit & Continue](#)

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.

Provide Additional Account Details

Account Information

Please confirm the Account Name and add the primary charitable purpose of the account.

The Account Name you previously set is shown below. You can keep it or make changes before continuing.

Account Name

Cannot have the words "foundation" or "trust"

LastName Fund

Primary Charitable Purpose

Example: "general philanthropy", "youth programs", "animal welfare", etc.

Save and Continue

Define your Charitable Succession Plan -----▶

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

Provide Additional Account Details

Define your Charitable Succession Plan

Begin by choosing an Individual or Charitable Organization to define your succession plan. You can add as many Individuals or Charitable Organizations as you want to now, and add more later from your account page if needed.

Individual

Appoint an Individual (Successor Grant Advisor) to succeed the Primary Grant Advisor and continue making grants after the Primary Grant Advisor's lifetime.

or

Charitable Organization

Appoint a Charitable Organization (Remainder Beneficiary) to receive a portion or the entirety of the remaining DAF funds after the Primary Grant Advisor's lifetime.

Continue

Managing Roles After Account Opening

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

Giving Tree Mega Test Fund

+ Add an Account | ❤️ Recommend a Grant | 📅 Plan a Contribution | 📊 DAF Insights | **\$14,999,748.45** ACCOUNT VALUE

Account Details | Contributions | Grants | Investments | Forms | Documents

Account Summary

Account Roles

Complete your Account Setup.

Continue Account Setup

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.

PRIMARY DONOR

Mr. Donor First
123 Apple Lane
Indianapolis, IN 46239
SSN: *****4234
DOB: 12/13/1962

EDIT

Mr. Bob Barter
123 Apple Lane
Indianapolis, IN 46239
SSN: *****7567
DOB: 06/15/1956

EDIT



PRIMARY DONOR

OTHER DONOR



OTHER DONOR

ACTIVE GRANT ADVISOR

Mr. Donor First
123 Apple Lane
Indianapolis, IN 46239
SSN: *****4234
DOB: 12/13/1962

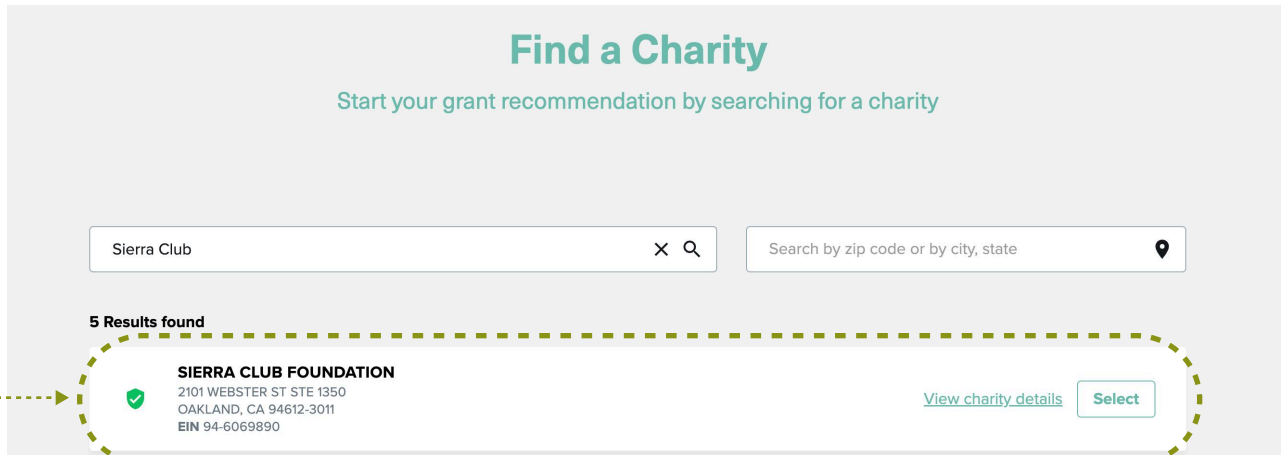
Mr. Bob Barter
123 Apple Lane
Indianapolis, IN 46239
SSN: *****7567
DOB: 06/15/1956



How to Recommend a Grant

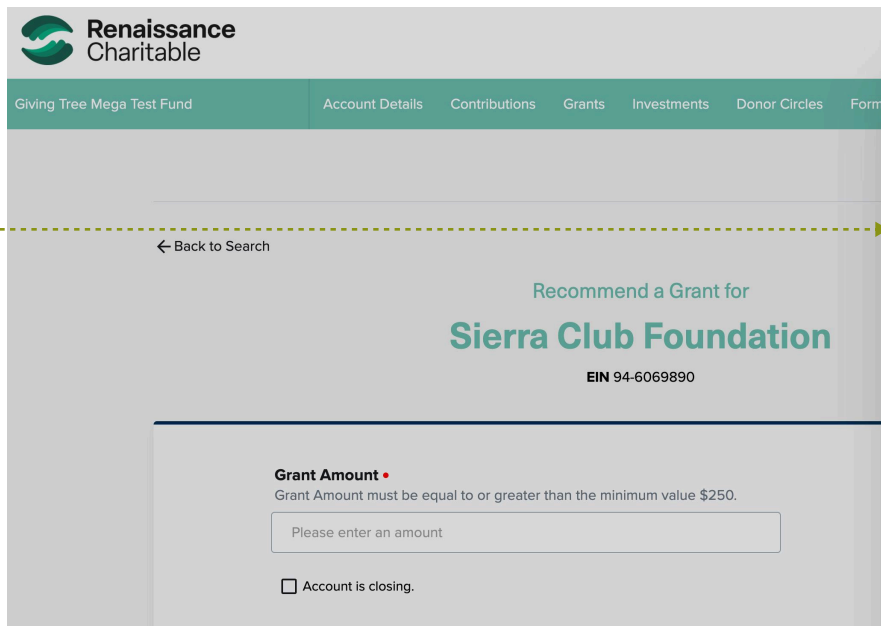
Find a Charity

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.



Grant Advisors

Select a Grant Advisor

Before proceeding, we need to know which grant advisor you are granting on behalf of.

Bob Barter →

Donor First →

[← Back to Search](#)

How to Recommend a Grant

Grant Amount

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

Grant Amount •

Grant Amount must be equal to or greater than the minimum value \$250.

Please enter an amount

☐ Account is closing.

\$14,997,248.45

① Grantable Balance

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 Details

Grant Advisor •

Bob Barter

[Change Grant Advisor](#)

Grant Timing •

When would you like to begin processing your grant recommendation?

Process Immediately

Future Date

Recurring Dates

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.

Grant Purpose •

Please tell us if the charity should use this grant for a specific purpose or if they can use it as needed.

Unrestricted - Please use as needed

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.

Dedications

Would you like to dedicate this grant to someone?

☐ Yes

☒ No

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.

Acknowledgements •

How would you like to be acknowledged in the grant correspondence with the charity?

Grant Advisor Name and Address

Bob Barter
123 Apple Lane
Indianapolis, IN 46239

[Change Acknowledgement](#)

☐ Include Fund Name

How to Recommend a Grant

Charity Address Selection → 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.

Available Mailing Addresses •

This charity has multiple addresses available. We've preselected the most common address used, but you may select a different address.

2101 WEBSTER ST STE 1350
OAKLAND, CA 94612-3011



Attention To

Entries to this field will display under the charity name for grant details, grant checks, and grant letters but will not be a permanent addition to the address.

Please enter a name

Contact Phone

Please enter the contact phone.

() - -



Cancel

Review Grant

Review Your Grant

Review the details to ensure accuracy before submitting for processing.

[← Back to Form](#)
[? Need Help?](#)

Review Your Grant

Almost done! Let's review and confirm your recommendation.

[PROCESS IMMEDIATELY](#)
[Edit Grant](#)

\$10,000.00
Sierra Club Foundation
EIN 94-6069890

2101 WEBSTER ST STE 1350
OAKLAND, CA 94612-3011

Grant Purpose	Dedicated to	Please Acknowledge
Unrestricted - Please use as needed	MJ Parker No address information provided	Grant Advisor Name and Address Bob Barter 123 Apple Lane Indianapolis, IN 46239

[Add Special Instructions](#)

Agreement

I have read and agree to the terms below:

- ☐ I affirm that all information in this form is true to the best of my knowledge, and that neither I nor my family will benefit in any way from this grant.
- ☐ I understand that this information represents a grant recommendation that I am making to the sponsor of my account and not a final grant decision.
- ☐ I affirm that neither I nor any related party control the governing board of any supported organization in the case of a grant to a supporting organization.
- ☐ I affirm that the grant does not fulfill a pre-existing binding pledge to the recommended charitable organization, unless otherwise disclosed within this grant submission.

[Save for Later](#)
[Cancel](#)
[Submit Grant](#)

[? Need Help?](#)

Grant is in Progress

Please allow up to 10 business days for your grant to be issued.

Sierra Club Foundation
EIN 94-6069890 GRANT ID 2819793 [View details](#)

\$10000.00

[In Progress](#)

Your grant will be processed as soon as possible. You can review its progress from the grant listings page.

[Back to Account Home](#)
[Grant Again](#)

Recent Activity

Recent Activity

All Accounts

Grants 1

Contributions 0

Grant Tracker

Preview of Grant to Sierra Club Foundation

Grant Submitted

Bob Barter's Grant of **\$10,000.00**, submitted on **07/31/2026**.

Grant Updates

 Grant Submitted ⓘ
07/31/2026

Grant Details

Grant ID: 2819793

Grant Advisor: Bob Barter

Name: Sierra Club Foundation

EIN: 94-6069890

Address Line 1: 2101 WEBSTER ST STE
1350

City: OAKLAND

State: CA

Zip: 94612

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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

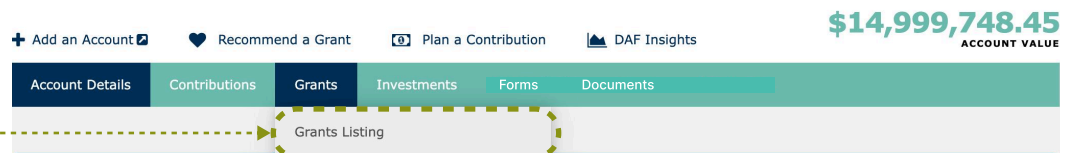
Purpose: Pledge
Special instructions not to appear on the letter:
Check Memo:

How Clients Track their Grant Status

Giving Tree Mega Test Fund

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.



Grant Listing

Recommend a Grant

\$251.55

Total Grants Paid *

0

Processing *

2

Pending *

1

Paid *

0

Future

0

Recurring

* = Totals for period 8/3/2025 - 8/3/2026.

Pending Grants

The grant recommendation has been submitted and is in the final review process.

Paid Grants

The grant has been paid to the qualified charitable organization.

PENDING GRANTS

Start Date

8/3/2025

End Date

8/3/2026

Apply Dates

Export to Excel

ID	RECEIVED	RECIPIENT	AMOUNT	TYPE	
2819793	7/31/2026	Sierra Club Foundation	\$10,000.00	Grant	REPEAT
2802753	9/2/2025	Renaissance Charitable Foundation Inc	\$2,500.00	Grant	REPEAT
			Total = \$12,500.00		

PAID GRANTS

ID	PAID	RECIPIENT	AMOUNT	TYPE	
2815030	1/7/2026	Wheeler Mission Ministries Inc	\$251.55	Grant	REPEAT

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.

in the last 3 hours.

Preview of Grant to Sierra Club Foundation

Grant Submitted

Bob Barter's Grant of **\$10,000.00**, submitted on **07/31/2026**.

Grant Updates

- Grant Submitted** ①
07/31/2026

Grant Details

Grant ID: 2819793
Grant Advisor: Bob Barter
Name: Sierra Club Foundation
EIN: 94-6069890
Address Line 1: 2101 WEBSTER ST STE 1350
City: OAKLAND
State: CA
Zip: 94612

To see additional details, go to the [Grant Details](#) page.

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

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Submitted: 08/06/2026
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Grant Submitted — 08/06/2026 : Your grant has been received. Vetting is now underway.
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- Charity Check Report - 8/6/2026

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Recommended by: Daniel
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GRANT PURPOSE / SPECIAL INSTRUCTIONS

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

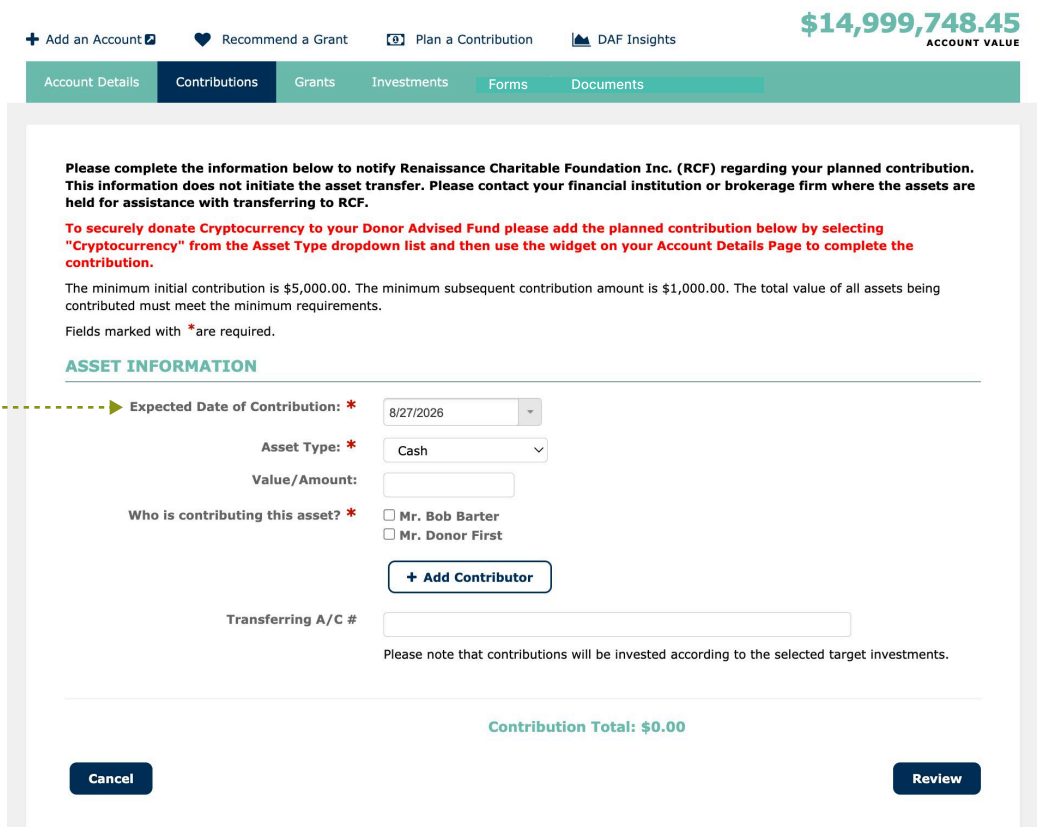
Add a Contribution

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.

Giving Tree Mega Test Fund

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.

Please complete the information below to notify Renaissance Charitable Foundation Inc. (RCF) regarding your planned contribution. This information does not initiate the asset transfer. Please contact your financial institution or brokerage firm where the assets are held for assistance with transferring to RCF.

To securely donate Cryptocurrency to your Donor Advised Fund please add the planned contribution below by selecting "Cryptocurrency" from the Asset Type dropdown list and then use the widget on your Account Details Page to complete the contribution.

The minimum initial contribution is \$5,000.00. The minimum subsequent contribution amount is \$1,000.00. The total value of all assets being contributed must meet the minimum requirements.

Fields marked with * are required.

ASSET INFORMATION

Expected Date of Contribution: *

Asset Type: *

Value/Amount:

Who is contributing this asset? * ☐ Mr. Bob Barter ☐ Mr. Donor First

Transferring A/C #

Please note that contributions will be invested according to the selected target investments.

Contribution Total: \$0.00

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

Add a Contribution

[+ Add an Account](#)
[♥ Recommend a Grant](#)
[📄 Plan a Contribution](#)
[📊 DAF Insights](#)
\$14,999,748.45
ACCOUNT VALUE

[Account Details](#)
[Contributions](#)
[Grants](#)
[Investments](#)
[Forms](#)
[Documents](#)

Contribution information was added successfully!

NOTE: Please review the information below for accuracy and click submit to complete.

Please complete the information below to notify Renaissance Charitable Foundation Inc. (RCF) regarding your planned contribution. This information does not initiate the asset transfer. Please contact your financial institution or brokerage firm where the assets are held for assistance with transferring to RCF.

To securely donate Cryptocurrency to your Donor Advised Fund please add the planned contribution below by selecting "Cryptocurrency" from the Asset Type dropdown list and then use the widget on your Account Details Page to complete the contribution.

The minimum initial contribution is \$5,000.00. The minimum subsequent contribution amount is \$1,000.00. The total value of all assets being contributed must meet the minimum requirements.

Key: ✎ = Edit ⌫ = Cancel

ASSET LISTING

Expected Date	Type	Name	Ticker	Quantity	Estimated Value/Amount	Transferring A/C #	Contributing Donor(s)	
08/27/2026	Cash	Cash		N/A	\$5,000.00		Mr. Donor First	✎ ⌫

Contribution Total: \$5,000.00

☐ Please acknowledge, by checking this box, that you understand the following:

1. The planned contribution is for RCF reconciliation purposes only to ensure accurate and efficient posting to your account.
2. This action does not initiate the transfer.
3. This action does not replace any transfer authorization paperwork required by the delivering firm.

[Add Asset](#)
[Submit](#)

Review and acknowledge the details of this action.

[← Back to Account Summary](#)

Giving Tree Mega Test Fund

[Change Account >](#)

[+ Add an Account](#)
[♥ Recommend a Grant](#)
[📄 Plan a Contribution](#)
[📊 DAF Insights](#)
\$14,999,748.45
ACCOUNT VALUE

[Account Details](#)
[Contributions](#)
[Grants](#)
[Investments](#)
[Forms](#)
[Documents](#)

[Contributions Listing](#)
[Plan a Contribution](#)
[Transfer Instructions](#)

[Plan a Contribution](#)

\$0.00

\$10,000.00

Total Contributions Accepted * **0** Accepted *

Total Contributions Invested * **0** Invested *

Total Contributions Receivable * **2** Receivable *

* = Totals for period 9/1/2025 - 9/1/2026.

Accepted	Invested	Receivable
Ownership of the contribution has transferred to the fund.	The proceeds from the contribution have been invested in one or more of the selected investment pools.	Ownership of a planned contribution has not yet transferred to the fund.

CONTRIBUTIONS

Start Date: 9/1/2025 End Date: 9/1/2026 [Apply Dates](#) [Export to Excel](#)

ID	DATE	INVESTED	NAME	QUANTITY	VALUE	STATUS
1239722	8/27/2026	Cash	N/A	\$5,000.00	Receivable	
1239659	7/31/2026	Cash	N/A	\$5,000.00	Receivable	

Total = \$10,000.00

Contribution Listing

View all the contributions to the account.

How to Get Contribution Letters and Statements

My Engagement Hub

[Go to DAF Insights](#) ★

[Recommend a Grant](#) →

[Add a Contribution](#) →

[Add an Account](#) ↗

News and Updates

Account Listing

View all your active and pending accounts

Active Donor Advised Funds **1**



Account Name	Current Value	Grant YTD	Contribution YTD
Giving Tree Mega Test Fund	\$14,999,748.45		

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.

[Recommend a Grant](#)
[Plan a Contribution](#)
\$45,000.00
ACCOUNT VALUE

[Account Details](#)
[Contributions](#)
[Grants](#)
[Investments](#)
[Forms](#)
[Documents](#)

Year: 2023
 [Manage Statements](#)

GRANT LETTER

- [Test Grant Letter 2023](#)

CONTRIBUTION LETTER

- [02-16-2023-4670756-TEST783](#)

STATEMENT

- [Test Statement 2023](#)

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	Quantity	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).

My DAF Insights

[Go to Engagement Hub](#)
[Recommend a Grant](#)
[Add a Contribution](#)
[Add an Account](#)

DAF Insights

Total DAF Assets

\$15.0M

Total Impact (Grants)

\$10,000.00

Total Contributions

\$0

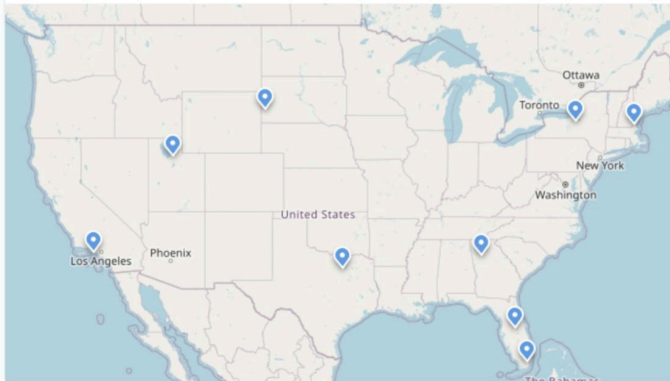
Grant Listing

Account Name	Grant Amount	Prioritized Status	Charity Name	Received Date	Predicted Issue Date
Giving Tree Mega Test Fund	\$10,000.00	Grant Submitted	Sierra Club Foundation	7/31/2026	8/4/2026

Grant Location and Category

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

Grants by Location and Category

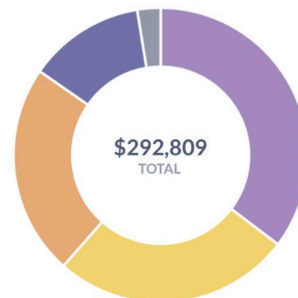


Last Period Account(s) Summary

Beginning Balance - (2025-07-01)	\$1,175,674.74
Contribution Total	\$112,000.00
Disbursement Total	\$0
Fees And Market Changes	\$0
Ending Balance - (2025-09-30)	\$1,287,674.74

Grants by NTEE Category

Unknown	35.33%
Not Specified	26.16%
Voluntarism/Grantmaking Foundations	23.16%
Animals	12.79%
Other	2.56%



DAF Insights

Contribution Listing

View all contributions across your managed accounts and their statuses.

Account Name ^	Transaction Amount ^	Asset Quantity ^	Asset Name ^	Asset Type ^	Status ^	Contribution Transaction ID ^	Account Code ^	Asset Rece
Lawrence Test Definitions	\$12,000.00	0	Cash	Cash	Accepted	1234953	LAWREN41	8/15/2025
Lawrence Test Definitions	\$100,000.00	-	Cash	Cash	Accepted	1234955	LAWREN41	8/15/2025

Asset Type

View your clients' portfolio asset types.

