



DonorFirst User Guide

*Helpful information about online access for
Tidewater Jewish Foundation fund advisors and representatives*

<https://jewishva.donorfirst.org/>

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Registering Your Account

Prior to registering your DonorFirst account, you will receive an email from TJFInfo@ujft.org containing the link to log in to the new site and create your personalized UserID and password. Accessing the link in that email will take you to the beginning of the registration process.

Enter Your User Account Information

Account Information

Username: *

Your preferred username; punctuation is not allowed except for periods, hyphens, and underscores.

E-mail Address: *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password: *

Confirm Password: *

Passwords must:

- *Be at least six characters in length
- *Contain at least one capital letter
- *Contain at least one number

Personal Information

First Name: *

Last Name: *

Date of Birth:

After registering you will be taken to your donor fund representative portal homepage, where you can view your fund balance, contribution and grant history, submit grants for processing, and view

interesting news and updates about initiatives important to the Foundation. All of these features are discussed in more detail below.

Reviewing Your Fund Balance

Once you have successfully logged into your donor fund representative portal, you will be able to easily review your fund balance by viewing your fund summary in the **Your Charitable Accounts** toolbar on the left-hand side of the page. If you are an advisor for multiple funds, they will be listed here for your review.

The screenshot displays the DonorFirst® user interface for the Tidewater Jewish Foundation. The top navigation bar includes the logo, a user greeting 'Hello, Demo Donor', and links for 'PROFILE & SETTINGS', 'FAQ', and 'SIGN OUT'. The left sidebar contains a 'Home' menu with options like 'Make A Grant Recommendation', 'Grant History', and 'Grants Pending Your Approval (0)'. Below this is the 'YOUR CHARITABLE FUNDS' section, which is highlighted with a blue circle. It shows a summary for the 'Tidewater Demo Donor Advised Fund' with a Fund Type of 'Donor Advised', a Fund Balance of '\$150,000.00', and a Grantable amount of '\$150,000.00'. Two buttons, 'CONTRIBUTE TO FUND' and 'OPEN NEW FUND', are visible. The main content area features a 'NEW GROUP ANNOUNCEMENTS' header, a welcome message from Scott Kaplan (President and CEO), and a 'DO YOU WANT' section about a \$2,500 grant match program. The right sidebar includes 'MY CONTACTS' with profiles for Ann Swindell and Randy Parrish, and a 'PUBLICATIONS' section featuring the 2016 Annual Report.

Clicking on your fund(s) name listed under **Your Charitable Accounts** will take you to that fund's main account page. Here you can view the fund's balance along with your grant activity, organizations you have previously granted to, recent contributions and other information.

Home
 Make A Grant Recommendation
 Grant History
 Grants Pending Your Approval (0)
 Recurring Grants (1)
[Make a Contribution](#)
 Contribution History
 Community Wish List
 Groups Directory

YOUR CHARITABLE FUNDS
 Tidewater Demo Donor Advised Fund
 Fund Type: Donor Advised
 Fund Balance: \$150,000.00
 Grantable: \$149,700.00
 CONTRIBUTE TO FUND
 OPEN NEW FUND

SEARCH FOR CHARITIES
 Start typing... Options
 SEARCH
 Powered by GuideStar

SUBSCRIBED GROUPS

FUND: DONOR ADVISED
 Tidewater Demo Donor Advised Fund
 Recent Grant History

Pending Approval No grants available

Recent Pending \$150.00 to Jewish Family Service of Tidewater (Processing)
 Total Pending: \$150.00 (1 grant)

Recent Grants and Payments
 03/08/2017: \$100.00 to Maccabi USA
 03/08/2017: \$2,000.00 to United Jewish Federation of Tidewater
 03/08/2017: \$4,858.00 to United Jewish Federation of Tidewater
 03/08/2017: \$10,000.00 to Union Of Orthodox Jewish Congregations Of America
 03/08/2017: \$2,500.00 to Norfolk Academy
 Total Paid: \$24,658.00 (9 grants)
[See Full Grant History](#)

Recent Contributions Activity

Submitted	Status	Type	Estimated	Valuation	Proceeds	Contributors
03/07/2017	Pending	Credit Card/ACH		\$124.00	\$124.00	Demo Donor
03/07/2017	Pending	Credit Card/ACH		\$125.00	\$125.00	Demo Donor
03/07/2017	Pending	Check	\$11,223.00			Virginia Crown
03/07/2017	Pending	Marketable Securities (Stocks/Bonds/Mutual Funds) Wire	\$2,500.00 \$500.00			Virginia Crown

FUND STATUS
 Active

FUND ACTIONS
 Make A Grant Recommendation
 Make a Contribution
 View Grant History
 View Contribution History

RESOURCES
 TIDEWATER JEWISH FOUNDATION
 Procedures for Operation of Philanthropic Funds.
 DonorFirst User Guide
 Asset Transfer Instructions
 FAQ's

FUND BALANCES
 Fund Balance: \$150,000.00
 Pending Grants: \$150.00
 Future Scheduled Grants (90 days): \$150.00
 Grantable Balance: \$149,700.00

FUND DOCUMENTS


Reviewing Your Grant History

You can easily review your recent grant history from the main account page, which provides you with a list of recent grants, dates they were submitted or completed and the amounts. To view the full history, click **See Full Grant History**

FUND: DONOR ADVISED
Tidewater Demo Donor Advised Fund
Recent Grant History

FUND STATUS
Active

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[View Contribution History](#)

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Procedures for Operation of Philanthropic Funds.
DonorFirst User Guide
Asset Transfer Instructions
FAQ's

Pending Approval No grants available

Recent Pending [\\$150.00 to Jewish Family Service of Tidewater \(Processing\)](#)
Total Pending: \$150.00 (1 grant)

Recent Grants and Payments [03/08/2017: \\$100.00 to Maccabi USA](#)
[03/08/2017: \\$2,000.00 to United Jewish Federation of Tidewater](#)
[03/08/2017: \\$4,858.00 to United Jewish Federation of Tidewater](#)
[03/08/2017: \\$10,000.00 to Union Of Orthodox Jewish Congregations Of America](#)
[03/08/2017: \\$2,500.00 to Norfolk Academy](#)
Total Paid: \$24,658.00 (9 grants)

[See Full Grant History](#)

Under the heading **Organizations (Grantees)**, you will find links to the charities you have submitted grants to in the past. These links will enable you to quickly look up information about the charity as well as submit additional grants to them by clicking on the **Make A Grant Recommendation** link, if you are a fund advisor.

Organizations (Grantees)

Organization	Number of Grants	Total Amount	Actions
Hope House Foundation	1	\$1,000.00	Make A Grant Recommendation
Jewish Family Service of Tidewater	1	\$300.00	Make A Grant Recommendation
Maccabi USA	1	\$100.00	Make A Grant Recommendation
Norfolk Academy	1	\$2,500.00	Make A Grant Recommendation
Union Of Orthodox Jewish Congregations Of America	1	\$10,000.00	Make A Grant Recommendation
United Jewish Federation of Tidewater	3	\$10,458.00	Make A Grant Recommendation
University of Richmond	1	\$300.00	Make A Grant Recommendation

Reviewing Your Contribution History

You can review your recent contribution history from your main account page, which provides you with a list of recent contributions, dates they were submitted, contributor, and the amounts. To view the full history, click **See Full Contribution History**. (Coming soon: the ability to make contributions directly to the fund online!)

Recent Contributions Activity

Submitted ▲	Status	Type	Estimated	Valuation	Proceeds	Contributors
03/07/2017	Pending	Credit Card/ACH		\$124.00	\$124.00	Demo Donor
03/07/2017	Pending	Credit Card/ACH		\$125.00	\$125.00	Demo Donor
03/07/2017	Pending	Check	\$11,223.00			Virginia Crown
03/07/2017	Pending	Marketable Securities (Stocks/Bonds/Mutual Funds) Wire	\$2,500.00 \$500.00			Virginia Crown
03/03/2017	Completed	Marketable Securities (Stocks/Bonds/Mutual Funds)		\$10,220.00	\$10,220.00	Mr. and Mrs. Demo Donor
03/02/2017	Completed	Cash		\$256.60	\$256.60	State Farm
03/02/2017	Completed	Cash		\$11,000.00	\$11,000.00	Mrs. Sue Philanthropy
02/21/2017	Completed	Cash		\$3,000.00	\$3,000.00	Mr. and Mrs. Demo Donor
02/21/2017	Completed	Cash		\$7,500.00	\$7,500.00	Mr. and Mrs. Demo Donor
02/21/2017	Completed	Cash		\$1,506.46	\$1,506.46	Anonymous

[See Full Contribution History](#)

Reviewing Your Fund Statements

Your fund statements are available on-line for your review on DonorFirst. The fund statements are stored in the **Account Documents** section found on the Charitable Account Details page. Click on the statements link and a PDF version of the statement will open. Here you may save and or print your statement. You can also access your Fund Statements using the **View Statements** link under **Your Charitable Fund** section. (Note; Representatives of our affiliates will be subscribed to group directories to obtain summary reports.)

YOUR CHARITABLE FUNDS

Tidewater Demo Donor Advised Fund

Fund Type: Donor Advised

Fund Balance: \$150,000.00

Grantable: \$149,700.00

[View Statements](#)

[CONTRIBUTE TO FUND](#)

[OPEN NEW FUND](#)

Recent Grants and Payments

[03/08/2017: \\$100.00 to Maccabi USA](#)

[03/08/2017: \\$2,000.00 to United Jewish Federation of Tidewater](#)

[03/08/2017: \\$4,858.00 to United Jewish Federation of Tidewater](#)


[03/08/2017: \\$10,000.00 to Union Of Orthodox Jewish Congregations Of America](#)

[03/08/2017: \\$2,500.00 to Norfolk Academy](#)

Total Paid: \$24,658.00 (9 grants)

[See Full Grant History](#)

RESOURCES



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SEARCH FOR CHARITIES

Start typing... Options

[SEARCH](#)

Powered by GuideStar

SUBSCRIBED GROUPS

Foundation News and Events

[EXPLORE ALL GROUPS](#)

Recent Contributions Activity

Submitted	Status	Type	Estimated	Valuation	Proceeds	Contributors
03/07/2017	Pending	Credit Card/ACH		\$124.00	\$124.00	Demo Donor
03/07/2017	Pending	Credit Card/ACH		\$125.00	\$125.00	Demo Donor
03/07/2017	Pending	Check		\$11,223.00		Virginia Crown
03/07/2017	Pending	Marketable Securities (Stocks/Bonds /Mutual Funds)		\$2,500.00	\$500.00	Virginia Crown
03/03/2017	Completed	Marketable Securities (Stocks/Bonds /Mutual Funds)		\$10,220.00	\$10,220.00	Mr. and Mrs. Demo Donor

FUND BALANCES

Fund Balance: \$150,000.00

Pending Grants: \$150.00

Future Scheduled Grants (90 days): \$150.00

Grantable Balance: \$149,700.00

ACCOUNT DOCUMENTS


Demo1 March 2017 Statement

Demo01 February 2017 Statement

[VIEW ALL DOCUMENTS](#)

Grant Entry Procedure Steps for Fund Advisors

To make a grant from your Donor Portal, click on the **Make A Grant Recommendation** link in the Navigation box in the upper left side of the page. There is also a link under the heading **Account Actions** on the right side of the Charitable Account Details page.



Hello, Demo Donor

[PROFILE & SETTINGS](#)

[FAQ](#)

[SIGN OUT](#)

[Home](#)

[Make A Grant Recommendation](#)

[Grant History](#)

[Grants Pending Your Approval \(0\)](#)

[Recurring Grants \(1\)](#)

[Make a Contribution](#)

[Contribution History](#)

[Community Wish List](#)

[Groups Directory](#)

YOUR CHARITABLE FUNDS

Tidewater Demo Donor Advised Fund

Fund Type: Donor Advised

Fund Balance: \$150,000.00

Grantable: \$149,700.00

[CONTRIBUTE TO FUND](#)

[OPEN NEW FUND](#)

SEARCH FOR CHARITIES

Start typing... Options

[SEARCH](#)

Powered by GuideStar

SUBSCRIBED GROUPS

FUND: DONOR ADVISED

Tidewater Demo Donor Advised Fund

Recent Grant History

Pending Approval No grants available

Recent Pending \$150.00 to Jewish Family Service of Tidewater: (Processing)

Total Pending: \$150.00 (1 grant)

Recent Grants and Payments

[03/08/2017: \\$100.00 to Maccabi USA](#)

[03/08/2017: \\$2,000.00 to United Jewish Federation of Tidewater](#)

[03/08/2017: \\$4,858.00 to United Jewish Federation of Tidewater](#)

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FUND STATUS

Active

FUND ACTIONS


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FUND BALANCES

Fund Balance: \$150,000.00

Pending Grants: \$150.00

Future Scheduled Grants (90 days): \$150.00

Grantable Balance: \$149,700.00

FUND DOCUMENTS

Clicking on either link will allow you to search for your favorite charity in the local database of grantees and through GuideStar. By entering all or part of the charity's name in the field labeled **Search our Database of Charities**, you will be given a list of all likely matches from our charity database.

MAKE A GRANT RECOMMENDATION

Search the Charity Database

To search our database of charities, enter the charity's name (or part of it), keyword, issue area, EIN, city, state and/or zip code.

Search

Advanced Search ▾

Select a Past Grantee

Your previous grantees appear below. Simply click on the organization name to make a grant to that organization.

<u>Hope House Foundation</u> , Norfolk, VA	<u>Jewish Family Service of Tidewater</u> , Virginia Beach, VA	<u>Maccabi USA</u> , Philadelphia, PA
<u>Norfolk Academy</u> , Norfolk, VA	<u>Union Of Orthodox Jewish Congregations Of America</u> , New York, NY	<u>United Jewish Federation of Tidewater</u> , Virginia Beach, VA
<u>University of Richmond</u> , Richmond, VA		

Can't Find Your Charity?

If you want to make a grant recommendation to a new charitable organization and cannot find it in our database, [click here to enter your charity](#).

You may also select one of your past grantee organizations. Click on your grantees name under **Select a Past Grantee** to begin a new grant. After selecting an organization, the grant recommendation form will display with your selected grantee.

Select a Past Grantee

Your previous grantees appear below. Simply click on the organization name to make a grant to that organization.

<u>Hope House Foundation</u> , Norfolk, VA	<u>Jewish Family Service of Tidewater</u> , Virginia Beach, VA	<u>Maccabi USA</u> , Philadelphia, PA
<u>Norfolk Academy</u> , Norfolk, VA	<u>Union Of Orthodox Jewish Congregations Of America</u> , New York, NY	<u>United Jewish Federation of Tidewater</u> , Virginia Beach, VA
<u>University of Richmond</u> , Richmond, VA		

If your charity search returns no results from our database, you may also elect to manually enter the charity's information by clicking on the **click here to enter your grantee** link. The Charity's name, City and State are required fields. Click on Next to open the grant recommendation.

Can't Find Your Charity?

If you want to make a grant recommendation to a new charitable organization and cannot find it in our database, [click here to enter your charity](#).

Charity Organization:

Name: *

☒ This is a US-based charity

Address 1:

Address 2:

City: *

State: *

Zip:

Country:

EIN:

Next

Search results will display all possible matches based on what was entered. Charities which you have previously granted to will be displayed with your most recent grant(s), from here you can review the grant details or copy the grant by clicking on Regrant.

On this page, you can view information about the charity that has been supplied to GuideStar through the Internal Revenue Service. By clicking on the name of the organization you will be taken to the organizations page where you can review reports and filings (including IRS 990's) for the charity, giving you more opportunity to research your intended grantee. You also have access the see the charity check report which is a summary of the grantees nonprofit status by clicking on **View Charity Check Report**.

MAKE A GRANT RECOMMENDATION

Search the Charity Database

To search our database of charities, enter the charity's name (or part of it), keyword, issue area, EIN, city, state and/or zip code.

house

Search

Advanced Search

HOPE HOUSE FOUNDATION

801 Boush Street
Suite 302
Norfolk, VA 23510

EIN: 54-0804383
[Make a Grant Recommendation](#)
[View Charity Check Report](#)

GRANT HISTORY

DATE	AMOUNT	STATUS	Fund
03/08/2017	\$1,000.00	Paid	Tidewater Demo Donor Advised Fund (Details Regrant)
TOTAL	\$1,000.00		

MOTHER SETON HOUSE INC
3333 Virginia Beach Boulevard
Suite 28
Virginia Beach, VA 23452

EIN: 54-1250483
[Make a Grant Recommendation](#)
[View Charity Check Report](#)

Once you have found the correct grantee, click on the **Make A Grant Recommendation** link to the right of the organization's name to begin processing your grant.

Grant Recommendation Form

After selecting an organization, the grant recommendation form will display with your selected charity. Here you can specify a grant amount, grant purpose, the frequency of the grant if you choose to make it a recurring grant, and the type of recognition you would like to appear on the grant letter accompanying the check.

MAKE A GRANT RECOMMENDATION

Second Step: Define Your Grant

Grantee Organization:
HOPE HOUSE FOUNDATION
 801 Boush Street, Suite 302
 Norfolk, VA 23510

Fund:
 Tidewater Demo Donor Advised Fund \$149,700.00

Grant Amount:
 \$
 The minimum grant amount is \$100.00

Purpose
 Please limit to 50 characters, use Special Instructions for more information.
 Ex: Annual Campaign, Capital Campaign, In honor of, In memory of

 (maximum 512 allowed, 512 characters left)

Special instructions to TJF staff
 Comments to staff concerning the processing of this grant. The grant recipient will not see these notes.

Regranting Schedule

Regranting Schedule:
 Do not automatically re-grant

Number of additional times to regrant:
 None

Donor Identity

☐ Anonymous ([More Info](#))

Select those to be recognized for this grant:

From: Demo Donor
 From: Virginia Crown
 From: Mr. and Mrs. Demo Donor
 From: Mr. John Donor

☐ Make this my default Identity

Grant Amount- Enter the amount of the grant you are recommending. Please do not use decimal points. TJF policy dictates a \$100 (one hundred dollar) minimum for all grant requests. Requests in whole dollar amounts preferred.

Purpose- Enter the purpose or program being supported. As legally binding pledges are not permitted to be paid from the Foundation by the IRS, grants using the word pledge and similar words may not be approved or processed.

Comments or Special Instructions- Here you can provide some special instructions or details about the grant to the grants team; such as, "Please acknowledge John Smith," or "This grant is in honor of Mary Jane."

Regranting Schedule- The Regranting Schedule will allow you to schedule future grants to the selected charity, for the same amount and purpose. You can select the frequency of the grant (monthly, quarterly, annually, etc.), and how many additional times in the future. Each grant will be treated as a **new** grant and will be reviewed for available funds and grantee eligibility. This is an optional field, and does not need to be utilized unless you wish.

Donor Identity- Please select who should be acknowledged for this grant, this will appear on the accompanying grant letter. You may choose to remain anonymous by utilizing the check box, or you may use one of the designations appearing in the box.

After filling in the above fields, click on Next to move to the grant submission screen.

Submitting Your Grant Recommendation

At the grant submission screen you can review the Grant Details that have been entered, such as the Grantee selected and Charitable Account information. If you would like to make any changes, click on **Make Changes** to return to the grant recommendation form.

Grant Details	
Grantee Organization	Hope House Foundation
Grant Amount	\$5,000.00
Fund	Tidewater Demo Donor Advised Fund
Donor	Demo Donor
Purpose	Annual Fund
Donor Designated Identity	From: Demo Donor
Grantee Details	
Organization Name	Hope House Foundation
EIN	54-0804383
Official Contact	Hope House Foundation 801 Boush Street, Suite 302 Norfolk, VA 23510
Fund Details	
Fund	Tidewater Demo Donor Advised Fund
Fund Balance	\$150,000.00
Grantable Balance	\$149,700.00
Grant Amount	\$5,000.00
After-Grant Balance	\$144,700.00

You can also select a **Begin Processing Date**. Here you can schedule a date in the future for the Foundation staff to begin processing your grant. Grants set up with a future processing date will show as “Scheduled” on your Recent Grant history. The Foundation staff will receive the recommendation on the day you have scheduled and begin the vetting process.

Grant Submission Settings

Begin processing this grant on

month: day: year:

Mar 10 2017

Before submitting your grant recommendation, you will need to review and acknowledge the **Legal Affirmation**. It is necessary to check the Legal Affirmation box shown in red text, before clicking the submit button.

MAKE A GRANT RECOMMENDATION

Third Step: Review and Submit Your Grant

☐ Save as Draft

☒ Submit Grant for Processing

Grant Submission Settings

Begin processing this grant on

month: day: year:

Mar 10 2017

Legal Affirmation

☒ Please confirm the following:

- I confirm that no benefits will be received in return for this/these donation(s).
- I confirm that this/these donation(s) do not satisfy a legal obligation or pledge.
- I understand that I will be contacted by TJF if there are any additional questions regarding the validity of this/these request(s).

Pursuant to TJF's Procedures for Operation of Philanthropic Funds, restrictions and prohibitions apply to distributions from philanthropic funds. You can access the full document here: [Procedures for Operation of Philanthropic Funds](#).

Cancel Make Changes Submit

After checking the box and clicking on the submit button, a confirmation page will appear and display a message at the top of the screen letting you know your grant has been submitted for processing. A message will also appear if this is a new grantee or if your selected grantee is a Supporting Organization and will require additional time for processing.

Your *Grant* has been created.

GRANT RECOMMENDATION

\$5,000.00 to [Hope House Foundation](#) from [Tidewater Demo Donor Advised Fund](#)

Grant Details

Grantee Organization	Hope House Foundation
Grant Amount	\$5,000.00
Fund	Tidewater Demo Donor Advised Fund
Donor	Demo Donor
Purpose	Annual Fund
Donor Designated Identity	From: Demo Donor

Administrative Details

Legacy Grant ID	
Grant Author	Demo Donor
Begin processing this grant on	03/10/2017

Grantee Details

Organization Name	Hope House Foundation
EIN	54-0804383
Official Contact	Hope House Foundation 801 Boush Street, Suite 302 Norfolk, VA 23510

STATUS

Processing

GRANT ACTIONS

Cancel
Copy
Grant Preview (PDF)

GRANT DOCUMENTS

[VIEW ALL DOCUMENTS](#)

ORGANIZATION GRANT ACTIVITY

Pending Approval
No grants available.

In Process
\$5,000.00 by Demo Donor

Paid
\$1,000.00 by Matthew Fine

Other
No grants available.

Making a Gift to your Fund

You can now submit a gift to your fund using on our Donor Portal. Simply click on the **Contribute to Account** button or the **Make a Contribution** link to get started

The screenshot displays the DonorFirst® user interface for the Tidewater Jewish Foundation. The top navigation bar includes the logo, a user greeting 'Hello, Demo Donor', and links for 'PROFILE & SETTINGS', 'FAQ', and 'SIGN OUT'. The left sidebar contains a 'Home' section with links like 'Make A Grant Recommendation', 'Grant History', and 'Make a Contribution' (highlighted with a blue box). Below this is a 'YOUR CHARITABLE FUNDS' section showing a 'Tidewater Demo Donor Advised Fund' with a balance of \$150,000.00. A 'CONTRIBUTE TO FUND' button is also highlighted with a blue box. The main content area features a 'NEW GROUP ANNOUNCEMENTS' section with a message from Scott Kaplan, President and CEO, and a 'DONOR ADVISED FUND MATCH PROGRAM' announcement. The right sidebar includes 'MY CONTACTS' with profiles for Ann Swindell and Randy Parrish, and a 'PUBLICATIONS' section for the 2016 Annual Report.

From the **Make a Contribution** page you have the option of submitting an Online Contribution via credit card or ACH (eCheck), or you can tell us about an Offline Planned Contribution via check, marketable securities, or another type of asset.

MAKE A CONTRIBUTION

Please choose whether you would like to contribute using a Credit Card/ACH or you can also record an "offline" contribution you plan to make with a check or transfer of marketable securities.

Asset transfer instructions can be found [here](#) and under "Resources" to the right of the detailed fund information.

For information on other ways to give, visit our [Planned Giving](#) page on our website.

Contributions/gifts are unconditional and are accepted with no expectation of goods or services to be provided. Contributions submitted in error must be reported immediately at 757-965-6111.

Select one of the following:

Online Contribution via Credit Card or ACH

Offline Planned Contribution (Check, Marketable Securities, Other)

Cancel

Submitting an Online Contribution

To submit a gift using a credit card or eCheck/ACH, click on the **Online Contribution via Credit Card or ACH** button.

Select one of the following:

Online Contribution via Credit Card or ACH

Offline Planned Contribution (Check, Marketable Securities, Other)

Cancel

For security purposes, you will be required to re-enter your username and password before you can proceed.

ONLINE CONTRIBUTION

Sign In

Please verify your credentials

Verify

Cancel

Select your fund and enter in the gift amount

ONLINE CONTRIBUTION

1 Charitable Account and Gift Amount

The minimum contribution amount is \$18.00.

Select Charitable Account *

Tidewater Demo Donor Adv

Gift Amount *

\$ 1500

Next

2 Payment Method

3 Honorary and Memorial Giving

4 Review and Submit

How to contribute:

Fill out the form on the left to make a secure contribution to your fund online.

Please allow up to 2 business days for processing.

For information on other ways to give, visit our Planned Giving page on [our website](#).

Your total contribution:

\$1,500.00

USD

*Please be aware that the Tidewater Jewish Foundation is charged a processing fee based on the total

Select your payment type (credit/debit card or ACH) and provide your payment information. You may use the address we have on file for your transaction. However, if your billing address differs from the address displayed, please select Add new address, and enter your billing address. Once complete, click Next.

ONLINE CONTRIBUTION

1 Charitable Account and Gift Amount

2 Payment Method

Payment Type *

Credit Or Debit Car

Card Number *

4111111111111111

Expiration Date *

October

2017

CVV2/CID

123

Your saved addresses

Demo Donor

5000 Corporate Woods Drive Suite 200

Virginia Beach, VA, 23462

Use this address

How to contribute:

Fill out the form on the left to make a secure contribution to your fund online.

Please allow up to 2 business days for processing.

For information on other ways to give, visit our Planned Giving page on [our website](#).

Your total contribution:

\$1,500.00
USD

You may opt to make your gift in honor of or in memory of someone. To do so, select yes at this step, and enter the person's name. You may include their address here as well.

3 Honorary and Memorial Giving

Is this an honorary or memorial gift?

☒ Yes ☐ No

Choose one of the following:

☒ In honor of ☐ In memory of

**Person this gift is in honor
or memory of: ***

Virginia Crown 1234 Main St U

Prev

Next

Review the summary of your contribution. You may edit the transaction at this time if you wish. When complete, click Submit. You will receive both a confirmation screen online, as well as a confirmation email that your transaction has been received. Once your gift has been processed, your Gift Acknowledgment letter (for your tax-reporting purposes) will be mailed to you.

ONLINE CONTRIBUTION

1 Charitable Account and Gift Amount

2 Payment Method

3 Honorary and Memorial Giving

4 Review and Submit

Please confirm that the information you entered is correct:

Charitable Account and Gift Amount

You contributed \$1,500.00 USD (including \$0.00 in fees) to the Tidewater Demo Donor Advised Fund

[Edit](#)

Payment Method

Credit card ending in 1111 and belonging to [Edit](#)

Honorary and Memorial Giving

Your gift will be in honor of Virginia Crown 1234 Main St Unit 545, New York, Ny 12345 [Edit](#)

Once you click 'Submit', this contribution cannot be cancelled.

[Cancel](#)

How to contribute:

Fill out the form on the left to make a secure contribution to your fund online.

Please allow up to 2 business days for processing.

For information on other ways to give, visit our Planned Giving page on [our website](#).

Your total contribution:

\$1,500.00
USD

Submitting an Offline Contribution

To make a planned, offline contribution to your Fund, such as a check you will mail or the transfer of securities or other assets, click the **Offline Planned Contribution** button.

Select one of the following:

Online Contribution via Credit Card or ACH

Offline Planned Contribution (Check, Marketable Securities, Other)

Cancel

Select your name from the list of fund contributors. You may select other individuals who are listed, such as your spouse, if you would like others acknowledged for this gift as well. You may add a new contributor if you do not see the other individual you are looking for. Once you have selected the appropriate donors' names, click Next.

MAKE A CONTRIBUTION

Record a planned "offline" contribution

Select Contributor(s)

Define Asset(s)

Review & Submit

Name	Address	Phone	E-mail Address
<input type="checkbox"/> Demo Donor (You)	5000 Corporate Woods Drive Suite 200, Virginia Beach, VA 23462		rparrish@ujft.org
<input type="checkbox"/> Virginia Crown	123 Main St, New York, NY 11121		cijntjev@reninc.com

Add new Contributor +

Next

Cancel

From the Asset Type dropdown box, select the type of asset you wish to transfer and complete all available fields, such as the check amount, or the name of a security, its estimated value, ticker, and the number of shares to be contributed. Once completed, click Add Asset. The added asset will now be listed at the bottom of the page.

MAKE A CONTRIBUTION

Record a planned "offline" contribution

Select Contributor(s)

Define Asset(s)

Review & Submit

Asset Type *	Company Name *	Est. Value *	Face Value	Ticker Symbol *	Shares/ Units *	Asset Transfer Option *
Marketable Securities (Stocks/Bonds/Mutual Funds)	Walmart	1000		WAL	100	

Visit the Resources section on the right of the Fund Detail page for information on how to transfer these assets.

Add Asset

	Asset Type	Description	Est Value	Face Value	Ticker/ Symbol/ Cusip	Shares/ Units	Asset Transfer Option
Remove	Check		\$514.00				
	Total		\$514.00				

Previous Page

Next

Cancel

You may also enter additional assets as well by completing the top portion of the page and clicking Add Asset again. When all gift assets you wish to contribute have been added, click Next.

Review the details of your contribution, including the selected assets and donor names. Once reviewed, click Submit.

You will receive both a confirmation screen that your contribution information was submitted and an email confirming your submission was received.

MAKE A CONTRIBUTION

Record a planned "offline" contribution

Select Contributor(s)

Define Asset(s)

Review & Submit

Assets [\(Make Changes to Assets\)](#)

Asset Type	Company/ Fund Name	Est Value	Face Value	Ticker/ Symbol/ Cusip	Shares/ Units	Asset Transfer Option
Check		\$514.00				
Marketable Securities (Stocks/Bonds/Mutual Funds)	Walmart	\$1,000.00		WAL	100	
Total		\$1,514.00				

Contributors [\(Make Changes to Contributors\)](#)

Donor Name	Address	Phone	E-mail Address
Demo Donor (You)	5000 Corporate Woods Drive Suite 200, Virginia Beach, VA 23462		rparrish@ujft.org

Previous Page

Cancel

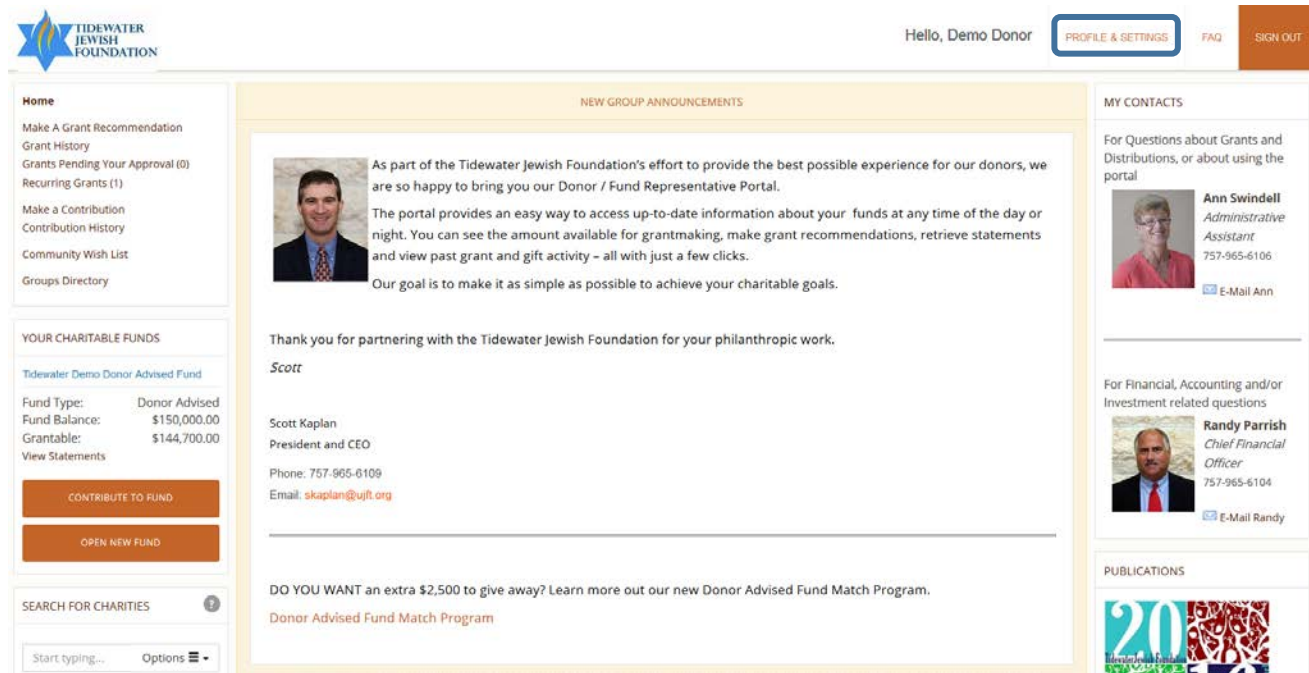
Submit Contribution on Behalf of:

Demo Donor

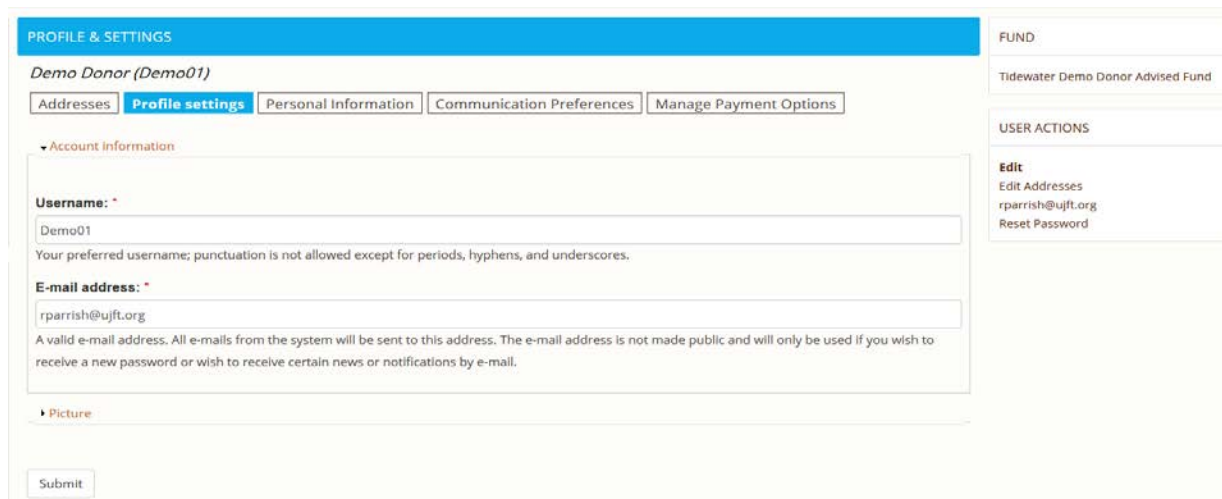
Submit

Editing Your User Profile

You can edit your profile information once you have logged into your account. In the upper right-hand corner, you will see a link labeled **Profile & Settings**.



Clicking on this link will take you to a page where you may change your e-mail address, your address (home, business, or second home), your personal information such as name or phone number, and your preferences for e-mail notifications. If you have subscribed to any groups, the site will email you when new information has been posted. If you do not wish to receive email from the site, indicate this preference under email notifications.



You may also edit any saved payment information used to make an Online Contribution.

Click on the **Manage Payment Options** tab. You will be required to verify you credentials in order to access the saved information.

PROFILE & SETTINGS

Demo Donor (Demo01)

Addresses **Profile settings** Personal Information Communication Preferences **Manage Payment Options**

▼ Account Information

Username: *
 Demo01
 Your preferred username; punctuation is not allowed except for periods, hyphens, and underscores.

E-mail address: *
 rparrish@ujft.org
 A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Picture

Submit

FUND
 Tidewater Demo Donor Advised Fund

USER ACTIONS
Edit
 Edit Addresses
 rparrish@ujft.org
 Reset Password

Saved credit card or banking information will be displayed her for you to edit or remove.

PROFILE & SETTINGS

Demo Donor (Demo01)

Addresses Profile settings Personal Information Communication Preferences **Manage Payment Options**

You have not yet added any profile. ✕

+ Add new payment method

Managing Your Group Subscriptions

You may change the number or type of groups you are subscribed to at any time. If you wish to simply unsubscribe from a group currently displayed on your dashboard, you may make use of the **Unsubscribe** button which appears next to each group title/heading. (Affiliate representatives should NOT unsubscribe from their groups if they desire to receive summary statements)

The screenshot displays the Tidewater Jewish Foundation DonorFirst® dashboard. In the top right corner, there is a user greeting "Hello, Demo Donor" and links for "PROFILE & SETTINGS", "FAQ", and "SIGN OUT". The left sidebar contains a "Home" section with links like "Make A Grant Recommendation", "Grant History", and "Groups Directory" (which is highlighted with a blue box). Below this is a "YOUR CHARITABLE FUNDS" section showing details for the "Tidewater Demo Donor Advised Fund". The main content area features a "NEW GROUP ANNOUNCEMENTS" section with a message from Scott Kaplan, President and CEO, and a "DO YOU WANT an extra \$2,500 to give away?" announcement. On the right, there are "MY CONTACTS" and "PUBLICATIONS" sections. At the bottom, there is a "Foundation News and Events" section. A blue box highlights the "Unsubscribe" button next to the "Foundation News and Events" group listing.

In addition, you can click on the **Groups Directory** link in the Navigation box on the upper left-hand side of your account page. Doing this will take you to the page listing all groups, as well as providing short descriptions of the groups and their purpose. You may subscribe or unsubscribe to any groups listed by making use of the button next to each group's title/heading.

This screenshot shows a closer view of the "Foundation News and Events" section at the bottom of the dashboard. The "Unsubscribe" button is clearly visible and highlighted with a blue box next to the group title.

Community Wish List

The Community Wish List are programs, events or organizations that have been selected by the Foundation as well-meaning and needing support. The link marked **Community Wish List** in the Navigation box will take you to a listing of all programs and charities; this will include brief descriptions and posted information of the activities and events.

The screenshot displays the DonorFirst® interface for the Tidewater Jewish Foundation. The top navigation bar includes the logo, a user greeting 'Hello, Demo Donor', and links for 'PROFILE & SETTINGS', 'FAQ', and 'SIGN OUT'. The left sidebar contains a 'Home' section with links like 'Make A Grant Recommendation', 'Grant History', and 'Community Wish List' (which is highlighted with a blue box). Below this is a 'YOUR CHARITABLE FUNDS' section showing details for the 'Tidewater Demo Donor Advised Fund', including a fund type of 'Donor Advised', a balance of '\$150,000.00', and a grantable amount of '\$150,000.00'. There are buttons for 'CONTRIBUTE TO FUND' and 'OPEN NEW FUND'. A 'SEARCH FOR CHARITIES' section is also present. The main content area features a 'NEW GROUP ANNOUNCEMENTS' header and a message from Scott Kaplan, President and CEO, welcoming donors to the portal. The right sidebar includes 'MY CONTACTS' with profiles for Ann Swindell and Randy Parrish, and a 'PUBLICATIONS' section featuring the 2016 Annual Report.

Clicking **Support** takes you to the grant recommendation screen, preselected with the grantee and grant purpose. Enter in the amount you would like to grant from your donor advised fund, and any additional special instructions, and click **Submit**.

GIVING OPPORTUNITIES

*There are always projects in our community that need funding. Now, you can see what these needs are! Simply click on the **Support** link to get more details and donate.*

Questions? Contact Ann Swindell at aswindell@ujft.org or 757-965-6106 or contact the agency directly.

Hebrew Academy of Tidewater: HAT Robotics Lab SUPPORT

Project:

HAT Robotics Lab

Affiliate:

Hebrew Academy of Tidewater

Project Cost:

\$6,000

Funding Need:

\$6,000

What it's all about:

We are so excited to introduce HAT Coding and Robotics Program. What is coding? Coding is a language that helps us communicate with technology. Through coding students learn: critical thinking, problem solving and basic computer science. Coding and Robotics combine language, technical knowledge and creativity to create products that we can share. The purpose of the coding and robotics program for HAT students is to give students an opportunity to flex their brain power in new and novel situations and to instill in them a self-driven passion for technology, science and engineering. The funds will go to purchasing 12 robotics kits, expansion sets and the software that programs the robots.

For more information please contact: Rabbi Menda, Director of Judaic Studies Hebrew Academy of Tidewater ymenda@hebrewacademy.net Ph. 757-424-4327



Thank you for using TJF's DonorFirst portal.
Please feel free to contact Ann Swindell, at 757-965-6106 or aswindell@ujft.org with any questions or comments you have about DonorFirst.
We hope you'll enjoy working with your philanthropy online!