THE CATHOLIC FOUNDATION

TIPS FOR USING YOUR ONLINE DONORLINK ACCOUNT

REPORTS

- **Current Fund Balance:** "Cash available" is updated 6-13 days after your last grant request. (Checks are processed on Thursdays.)
- **Ability to View and Print 2017 Fund Statements:** Choose "Reports" option on the right to create date specific reports for your fund balance, gifts made and grants recommended.

GRANTS

- **Recommend Grant**: Search the "From grant recipient list" option first to see if your organization is already in our system. If not present, use the option "Type in a new grant recipient."
- **Grant History:** If you've made previous grant requests to an organization use the "Grant history" option. Click on the organization, then press "Create a grant recommendation for this recipient." Then proceed to fill out the amount and other required fields.
- **IRS compliance reminder**: Keep in mind when purchasing fundraising dinner seats, golf tournament tickets etc., that you may use your fund for only the charitable portion of the ticket. The IRS requires that all grant recommendations must comply with this statement:

  "This grant, if made, will not satisfy any pledge, dues, memberships or other contractual obligations already committed, and will not provide me with any substantial benefit."

- **Note: Campaign Pledges** may not be paid through Donor Advised Funds.

CONTRIBUTIONS

- If you want to add money to your fund, click "Contribute" on the right.
- "Contribution history" option will show you recent additions to your fund.
- If you would like to contribute stock, click here: Stock Transfer Instructions.
- If you would like to contribute estate or other unique gifts click here:

If you need to know any information that is not available through your DonorLink online account, please don't hesitate to contact us.

Thank you,
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