



A Quick Start Guide to Your Personal Giving Account

Your Personal Giving Account with the Bradley Impact Fund is a donor-advised fund (DAF). It provides a simple, flexible, and efficient way to manage your charitable giving. Enjoy immediate and maximum tax advantages, make grants on a flexible timetable, build your charitable legacy, and increase your philanthropic funds for grant making. Let's get started...



BRADLEY
IMPACT FUND®
PRINCIPLED PHILANTHROPY

Donor Services

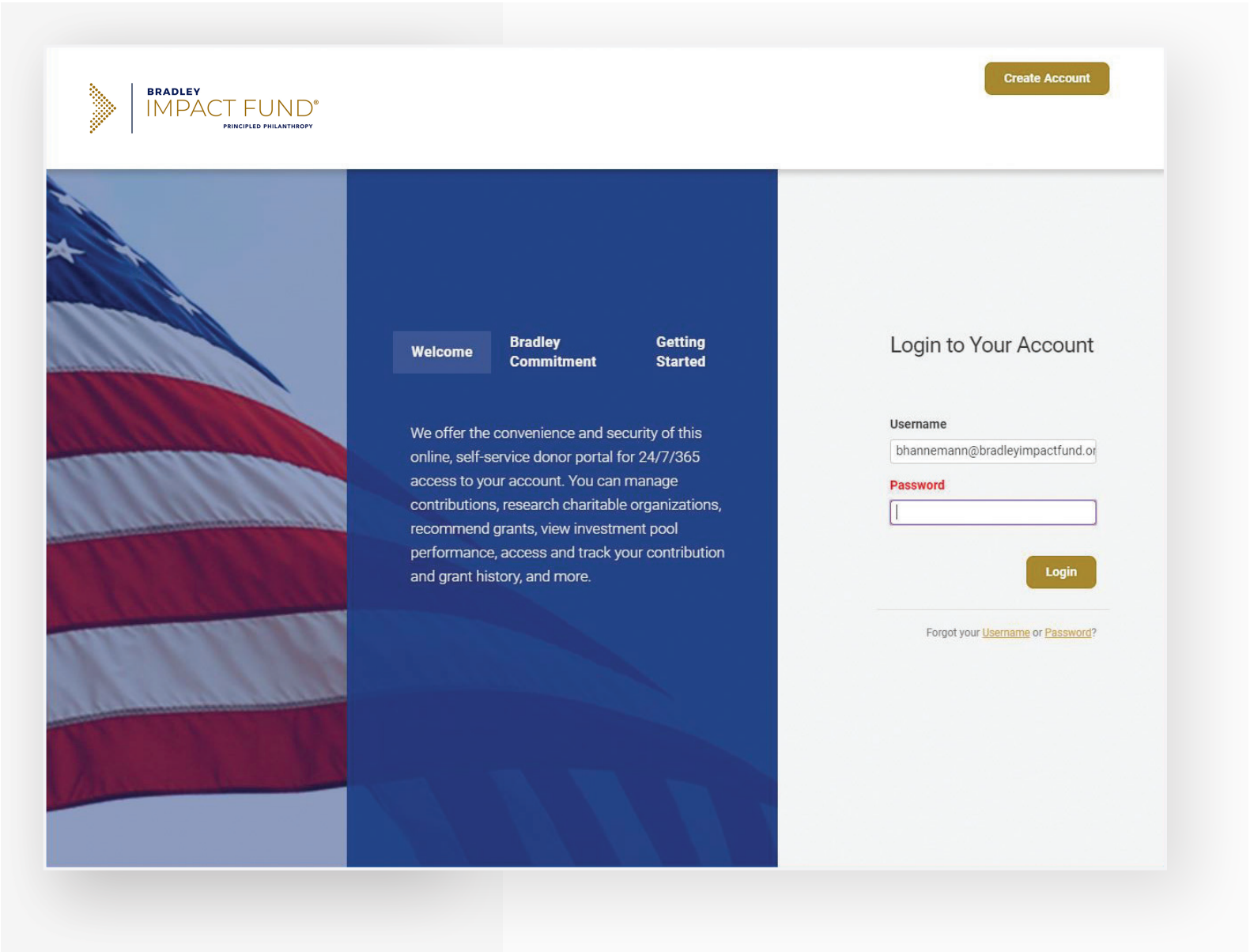
Providing excellent service to the members of our donor community is our top priority at the Bradley Impact Fund. While this *Quick Start Guide* highlights the ease and convenience of logging into our online donor portal for secure 24/7/365 access to your account, we are just as committed to providing you with hands-on, personal support.

From providing insights on nonprofit organizations, to promptly processing a grant from your account to a preferred charity you have supported for years, we are happy to meet with you in-person or on the phone to assist you with all aspects of your Personal Giving Account. Please contact us at 414-291-2500.



ONLINE DONOR PORTAL

Visit <https://bif.donorfirstx.com> and login to your account using the *Username* and *Password* that was provided when you opened your account. Once logged in you will be able to manage contributions, research charitable organizations, recommend grant disbursements, view investment pool performance, access and track your contribution and grant history, update personal information, and more.



Your account balance always appears on the upper right of the screen, regardless of what action you have selected. Recent contributions and recent disbursements from your account can also be checked at a glance upon logging into your account home page.

4 | Quick Start Guide • bradleyimpactfund.org

2. How do I make a grant disbursement?

Find all grant disbursement information under the *Disbursements* menu. View summary or detailed information, recommend grants (minimum \$500) to your favorite charities, and repeat grants that have been previously recommended. Bradley Impact Fund staff is also happy to manage the grant disbursement process for you offline. Simply contact us via phone or e-mail with the list of grant recipient(s) and the amount(s) for each grant.

General Partnership Fund

Recommend a Disbursement

Plan a Contribution

Account Details

Contributions

Disbursements

Investments

Forms

Statements

Disbursement #1342414 Details

DISBURSEMENT RECIPIENT INFORMATION

Name: [REDACTED]
EIN: [REDACTED]
Contact: [REDACTED]
Address 1: [REDACTED]
City: [REDACTED]
State: [REDACTED]
Zip: [REDACTED]
Advisor: Bradley Impact Fund

DISBURSEMENT INFORMATION

Date Received: 7/20/2018
Date Approved: 7/24/2018
Date Check Issued: 7/25/2018
Check Number: 10407
Date Check Cleared: 8/7/2018
Disbursement Amount: \$10,000.00

GUIDESTAR CHARITY CHECK REPORT(S):

- GuideStar Charity Check Report - 7/24/2018
- GuideStar Charity Check Report - 7/20/2018

DISBURSEMENT TIMING

One time grant to be processed immediately

DISBURSEMENT RECOGNITION

Name of the Fund: Y
Primary Donors: Y
Include Donor Address: Y

DISBURSEMENT PURPOSE / SPECIAL INSTRUCTIONS

Purpose: Unrestricted
Special instructions not to appear on the letter:

Return to Previous Page

Disbursement Listing

Recommend a Disbursement

Export to Excel

Total Disbursements Paid *

0

Processing *

0

Pending *

3

Paid *

0

Future *

0

Recurring *

* = Totals for period 8/17/2017 - 8/17/2018.

Paid Disbursements

The grant has been paid to the qualified charitable organization.

PENDING AND PAID DISBURSEMENTS

Start Date

8/17/2017

End Date

8/17/2018

Apply Dates

ID	RECEIVED	PAID	RECIPIENT	AMOUNT	STATUS	TYPE	
1342414	7/25/2018		[REDACTED]		Paid	Grant	REPEAT

3. How do I make contributions to my account?

The Bradley Impact Fund accepts contributions from individuals, families, companies, public charities, estates, trusts, and private foundations. The Bradley Impact Fund is classified as a 501(c)(3) public charity under the Internal Revenue Code. As such, contributions to the Bradley Impact Fund offer immediate and maximum tax benefits. The minimum initial contribution to open a Personal Giving Account is \$5,000. Additional contributions of at least \$1,000 may be made at any time.

To contribute to your account, please contact us at 414-291-2500. Acceptable asset types include: cash, marketable securities, life insurance policies, bequests and deferred giving vehicles, closely held stock, real estate (not subject to a mortgage), art and collectibles.

Track your contribution history and details related to individual contributions under the *Contributions menu*.

General Partnership Fund

+ Add an Account

Recommend a Disbursement

Plan a Contribution

ACCOUNT VALUE

Account Details

Contributions

Disbursements

Investments

Forms

Statements

Contributions Listing

Export to Excel

Plan a Contribution

\$0.00

Total Contributions Accepted *

0

Accepted *

174

Invested *

0

Receivable *

* = Totals for period 8/17/2017 - 7/23/2018.

Accepted

Ownership of the contribution has transferred to the fund.

Invested

The proceeds from the contribution have been invested in one or more of the selected investment pools.

Receivable

Ownership of a planned contribution has not yet transferred to the fund.

CONTRIBUTIONS

Start Date

8/17/2017

End Date

7/23/2018

Apply Dates

ID	DATE	INVESTED	NAME	QUANTITY	VALUE	STATUS
682999	7/23/2018		Cash	0.00	\$500.00	Pending Investment
663806	7/19/2018	7/20/2018	Cash	0.00	\$1,000.00	Invested

4. How do I view and download my quarterly statements?

Your archive of quarterly statements, grant letters, tax receipt(s), and contribution letters are all available in downloadable PDF format under the *Statements menu*.

General Partnership Fund

+ Add an Account

Recommend a Disbursement

Plan a Contribution

ACCOUNT VALUE

Account Details

Contributions

Disbursements

Investments

Forms

Statements

Year: 2018

Manage Statements

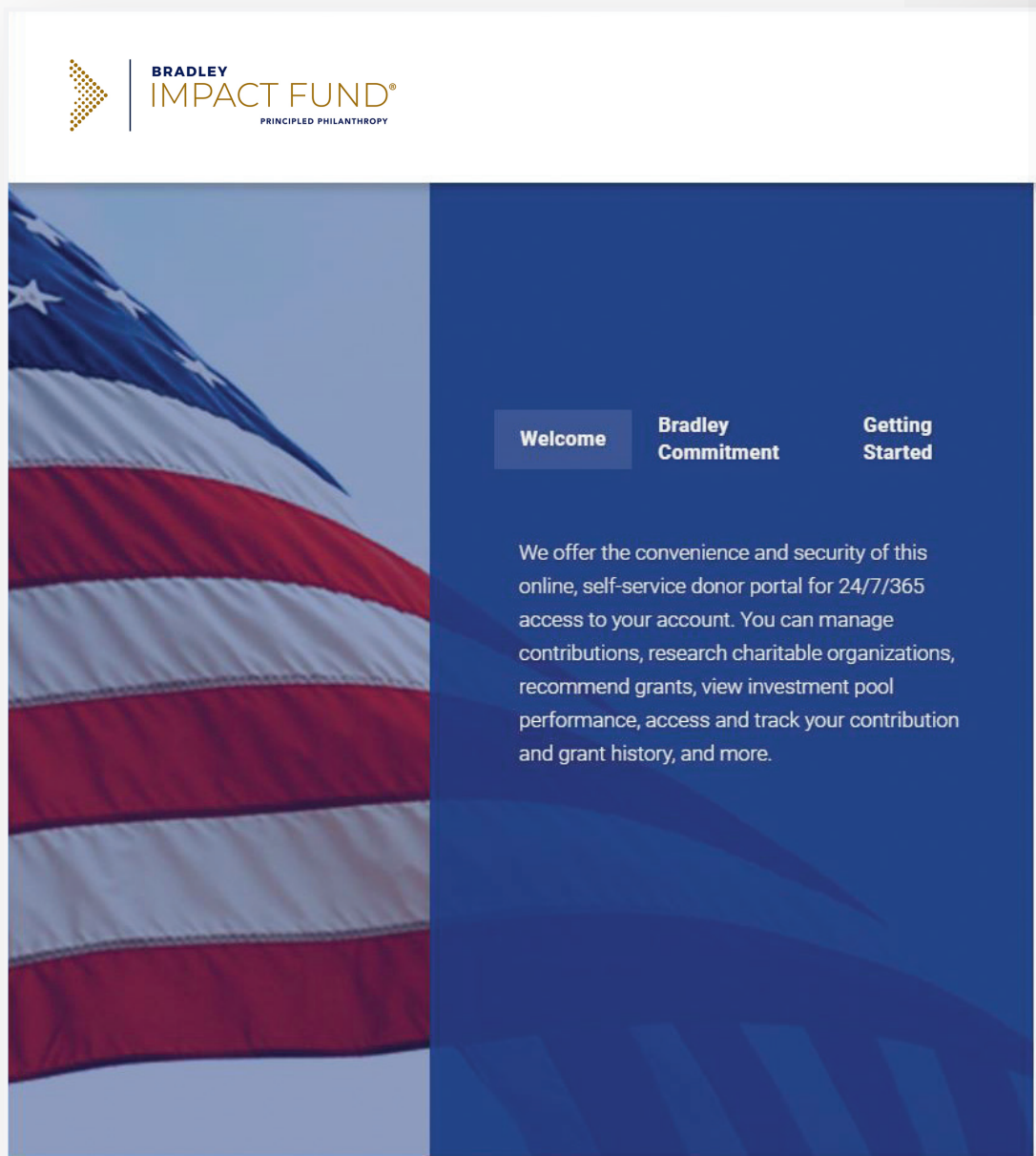
GRANT LETTER

CONTRIBUTION LETTER

5. I forgot my username and password, what do I do?

If you have misplaced your password, you can generate a new password using the *Username* and email address that your account is registered with. Click the appropriate link on the login page to update these details and access your account online (as illustrated below). If you run into any difficulties generating a new password, please contact us at 414-291-2500 and a Bradley Impact Fund staff member will assist you in accessing your account.

To create a new password: Upon the request to create a new password, a link will be sent to your email. Click on the link and you will be directed to reset your password. Then you can login to your account using your new password.

The image shows a 'Reset Your Password' form. At the top, the Bradley Impact Fund logo is visible. Below it, the title 'Reset Your Password' is centered. A note states 'Fields marked with * are required.' There are two input fields: 'Enter New Password' and 'Confirm New Password'. To the right of these fields, a box lists the password requirements: 'Your password must meet these minimum requirements:' followed by four checkboxes: 'Must be a minimum of 7 characters in total length', 'Must be a minimum of 1 capital letters', 'Must be a minimum of 1 lower case letters', 'Must be a minimum of 1 numbers', and 'Must be a minimum of 1 special characters'. A 'Submit' button is located at the bottom right of the form.The image shows a 'Login to Your Account' form. The title 'Login to Your Account' is centered at the top. Below it, there are two input fields: 'Username' and 'Password'. The 'Username' field contains the text 'bhannemann@bradleyimpactfund.org'. The 'Password' field is empty. Below the 'Password' field, there is a 'Login' button. At the bottom of the form, there is a link that says 'Forgot your Username or Password?'. This link is circled in red.



BRADLEY
IMPACT FUND®

1400 N. Water Street, Suite 300
Milwaukee, WI 53202
(414) 291-2500
bradleyimpactfund.org