



## Calvert Giving Fund Website Overview:

Thank you so much for working with Calvert Foundation to facilitate your philanthropic needs. Calvert Giving Fund is the only 100% socially responsible, donor advised fund and we are excited to have you onboard!

### Getting Started

- Log on to: [www.calvertgiving.org](http://www.calvertgiving.org)
- Click on the top, gray tab that says “Giving Fund Log-In”
- On this new page, enter your username and password that you were issued with your Giving Fund paperwork. If you don’t know this, please feel free to call 800.248.0337 and a customer service representative will assist you.

### My Funds

- *Balance*- Click here to see your current overall balance, as well as the investments held in your account.
- *Activity*- Change the date range and click “**Submit**” for your account activity to appear here. This will give aggregate grants, investments, administrative costs, and investment gains, but will not break it down by specific pieces.
- *Statements*- Click here to view previously prepared quarterly statements.
- *Relationships*- This tab shows all individuals with access to your account

### My Grants

- *Recommend a Grant*- Click here to enter a grant recommendation
  1. Giving to a new charity
    - a. Click on “**Add a Charity**”
    - b. Type name of charity in search field and hit “**Search**”
    - c. If your charity appears, click on the charity name and then click on “**New Grant.**”
      - Enter your grant details here, then hit “**Submit**” when finished.
      - On next screen hit “**Confirm Grant Recommendation**” to process grant request.
    - d. If your charity does not appear here, click on the “**Suggest a Charity**” button.
      - Fill out all known information about charity on next page. Hit “**Submit.**”
      - On the next screen, you will see your charity listed. Click “**New Grant**” to the right of your charity.

- Enter your grant details here, then hit “**Submit**” when finished.
    - On next screen hit “**Confirm Grant Recommendation**” to process grant request.
  - 2. Giving to existing charity
    - a. Click on “**New Grant**” button next to the charity you would like to give to.
    - b. Enter your grant details here, and then hit “**Submit**” when finished.
    - c. On next screen hit “**Confirm Grant Recommendation**” to process grant request.
- *Single Grants*-Shows historical grant activity
  - 1. Use drop-down menu to pick date range. Use **Advanced Search** to enter a specific date range.
    - a. **Entered**- Grant was submitted for processing. You can still edit grant details at this stage.
    - b. **Approved**- Grant has been approved for payment. To make changes to grant, contact Calvert Foundation.
    - c. **Posted**- Grant check has been mailed.
    - d. **Cleared**- Calvert Foundation does not record check clearing information. If you have questions on a specific check, please contact Calvert Foundation.
- *Recurring Grants*- Shows historical grant activity for recurring grants. Recurring grants can not be edited once entered. Please contact Calvert Foundation to make any changes.

### **My Pending Contributions**

- *Contribution Activity*- Sort by date range to see all past account donations

### **My Profile**

- *Profile*- Use this form to update all contact information, click “**Save**” to submit changes.
- *Change Password*- Update password information here.

### **Download Forms**

- Download all necessary Giving Fund forms here, from additional grant forms to successorship plans.

### **Please direct all Giving Fund inquiries to:**

800.248.0337-phone

301.280.1399-fax

[Sabrina.Iga@calvertfoundation.org](mailto:Sabrina.Iga@calvertfoundation.org)

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