

Wycliffe Foundation

DAF Online Guide

Thank you for setting up a donor advised fund (DAF) account with Wycliffe Foundation!

This guide is designed to help you access and navigate the online Portfolio Review website. Scroll through the entire document to see a walk through or use the following links to jump to a section of interest.

If you have questions that this document does not answer, please contact the Foundation staff by email at Foundation@wycliffe.org or you can speak with Priscilla Rogers by phone at 407-852-3685.

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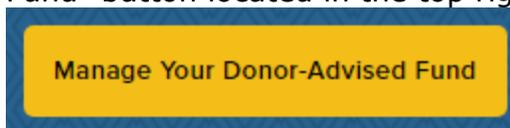
[Make a Grant from your DAF](#)

[Update your Profile \(address, phone, email, password\)](#)

Access the DAF Website

There are two ways to navigate to the DAF portfolio review website:

1. Type "wycliffe.org/DAFlogin" into your browser
2. From the wycliffefoundation.org website, click on the "Manage Your Donor-Advised Fund" button located in the top right-hand corner of the home page:



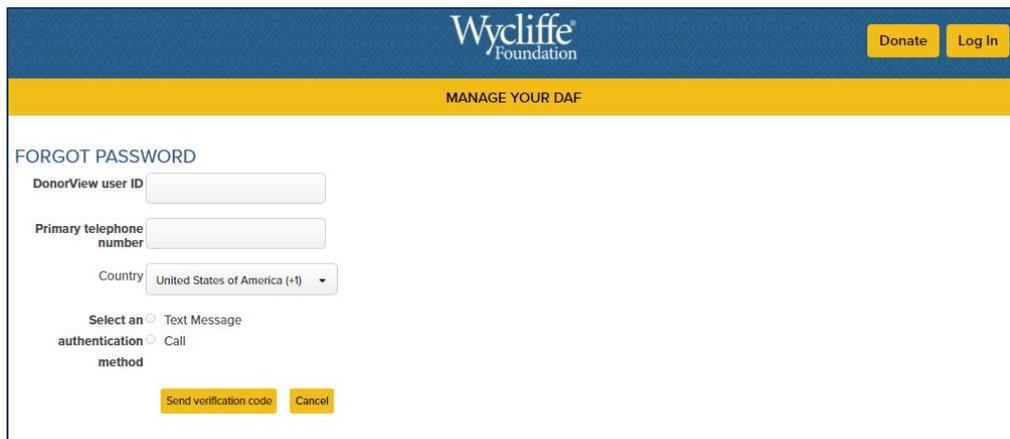
First Time Signing Into Your Account & Forgot Password

- Login Page: wycliffe.org/DAFlogin
- User: Enter your email address as your User name
- Password: Leave password box blank when logging in the first time.
- Select "Forgot Password"

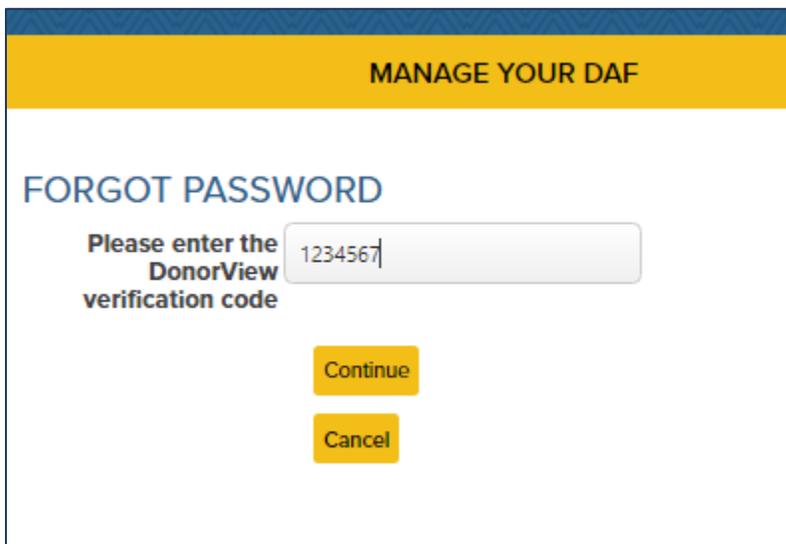


Enter your information on the "Forgot Password" page:

- DonorView user ID: Enter your email address
- Add your telephone number
- Select "Text Message" or "Call" for verification.
- Click "Send verification code"



Enter the verification code sent to you and click "Continue"



MANAGE YOUR DAF

FORGOT PASSWORD

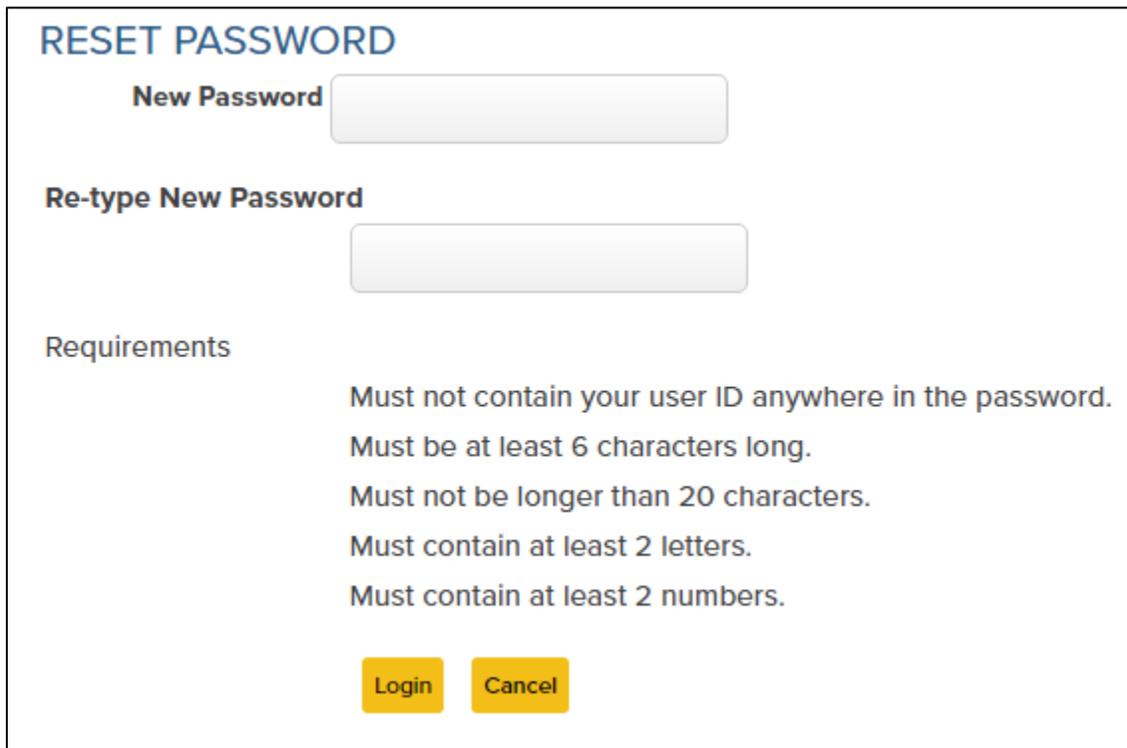
Please enter the DonorView verification code

Continue

Cancel

Reset Password:

- The system will prompt you to enter a new password.
- Choose a new password at least 6 characters long, but no longer than 20 characters. It must contain at least 2 letters and 2 numbers.



RESET PASSWORD

New Password

Re-type New Password

Requirements

- Must not contain your user ID anywhere in the password.
- Must be at least 6 characters long.
- Must not be longer than 20 characters.
- Must contain at least 2 letters.
- Must contain at least 2 numbers.

Login Cancel

Donor Dashboard

After you set up your new password, you will see your Donor Dashboard where you can recommend a grant, add to your fund, see your contribution activity and grant history as well as your current balance.

Two ways to navigate the website

1. Use the Menu on the left side of the page
2. Use the dropdown above the words "DONOR DASHBOARD" by placing your cursor over "MANAGE YOUR DAF".

MENU Options:

- Donor Dashboard
- Fund Activity
- Contribution Activity
- Recommend a Grant
- Grant History
- Recurring Grants
- My Profile
- Forms & Documents
- Add to My Fund

Wycliffe Foundation

Donate Log Out

MANAGE YOUR DAF

Donor Dashboard

DONOR DASHBOARD

Select your Donor-Advised Fund from the dropdown below

FUND

☺ Test June Account

Test June Account (Fund ID 12179)
Wycliffe Bible Translators

QUICK LINKS

Add to My Fund

Recommend a Grant

FUND BALANCE

The Market Value displayed below represents the latest available value of investments in your fund. Available balance is the market value adjusted for pending transactions

\$31,958.00 (available for grants)*
\$39,124.00 (market value)*

*Note that this is an estimate based on most recently available information. See Fund Activity for pricing date information.

CONTACT US:

For financial questions about your donor advised fund, please email Foundation@Wycliffe.org or call 407-852-3685

If you'd like to speak to your Senior Gift Planning Advisor about charitable gifting strategies of assets, planned, and/or estate gifts, please contact:

 [David Davies](mailto:David.Davies@wycliffe.org)
816-916-7244
David.Davies@wycliffe.org

GO GREEN

Check here if you would like to be notified by email when your statement is available online. You will no longer receive paper statements.
You are currently receiving statements by mail.

STATEMENTS

[Open Last Statement \(In Acrobat\)](#)
[See All Fund Activity and Statements](#)

TOTAL CONTRIBUTIONS

Recent Contributions

AMOUNT	TYPE	STATUS	DATE
\$1,234.00	Credit Card	Entered	7/15/2021
\$515.00	Credit Card	Entered	6/29/2021

Fund Activity & Statements

Select "Fund Activity" from the Menu to view your "Fund Activity" page

➡ Click the dropdown under the "Search" area to select the range of time you would like to view your fund activity.

➡ You may also download statements from this page

Donor Dashboard

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FUND ACTIVITY

FUND

☑ Test June Account

Test June Account (Fund ID 12179)

Wycliffe Bible Translators

QUICK LINKS

[Add to My Fund](#)

[Recommend a Grant](#)

GET STATEMENTS:

6/1/2021 - 6/30/2021

[Get Acrobat Reader](#)

FUND ACTIVITY REPORTS

SEARCH:

Range

Last 90 Days

[Last 30 Days](#)

[Last 60 Days](#)

Last 90 Days

[Last 6 Months](#)

[Last 12 Months](#)

[Before](#)

[Range](#)

FUND ACTIVITY SUMMARY

SECTION	AMOUNT
Beginning Balance:	\$0.00
Total Period Contributions:	\$41,124.00
Total Period Grants:	(\$1,000.00)
Earnings Allocated to Account:	\$0.00
Administrative Cost Assessment:	\$0.00
Other Activity:	(\$1,000.00)
Change in Value of Investments:	\$0.00
Ending Balance:	\$39,124.00

FUND ACTIVITY DETAIL

ENDING BALANCE: REPORT AS OF 7/15/2021

DESCRIPTION	QTY	PRICE	AMOUNT	PERCENTAGE
Cash	39124	\$1.00	\$39,124.00	100.00%
Total			\$39,124.00	

[Export to PDF](#)
[Export to Excel](#)

Contribute to your DAF

Use the "Add to My Fund" button to contribute to your DAF account using an e-check or credit card.

- *Note: There is a processing fee for credit card donations and this amount will be deducted from the amount that is added to your DAF account.*

Wycliffe Foundation Donate Log Out

MANAGE YOUR DAF

DONOR DASHBOARD

Select your Donor-Advised Fund from the dropdown below

FUND

Test June Account (Fund ID 12179)
Wycliffe Bible Translators

QUICK LINKS

- [Add to My Fund](#)
- [Recommend a Grant](#)

FUND BALANCE

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 [David Davies](#)
816-916-7244
David_Davies@wycliffe.org

GO GREEN

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You are currently receiving statements by mail.

“Online Contribution” page:

- ➡ If you have multiple Donor Advised Funds, click the dropdown arrow under the blue “FUND” bar and select the DAF you would like to add funds to.
 - Enter the amount you wish to add to your DAF.
- ➡ You can click the check box if you wish to add extra to cover the fees that are charged for credit card donations.
 - Verify the rest of the information, then click on “Continue to payment information.”

MANAGE YOUR DAF ▾

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ONLINE CONTRIBUTION

FUND

PLEASE MAIL CHECKS TO:
Wycliffe Foundation
Attn.: Donor Advised Fund (enter DAF name here)
PO Box 620486
Orlando, FL 32862-0486

Test June Account (Fund ID 12179)
Wycliffe Bible Translators

Contribution Amount

Description Test June Account

➡ Wycliffe Foundation provides online giving services at no cost to donors, however, a third-party, 3% processing fee applies to gifts made with a credit card. While you will receive a charitable tax deduction for the full amount of your gift, the ministry will receive this gift net of fees and the net amount is what will be posted to your DAF account. Check this box if you want to increase your contribution to cover the fees OR please consider choosing "Online Check" on the next page.

Your New Contribution Total **\$1,030.00**

Contributor Information

First Name

Last Name

Company Name

Select

Mailing Address 123 main street
City, Florida 18360

Use Same Address For Billing Address

Phone Number

Cell Number

Email Address

Honorarium / Memorial

In Honor of:

In Memory of:

[Continue to payment information](#)

On the "Payment & Confirmation" page:

- Select payment type: online check (no fees) OR credit card.
- Enter the required information and click "Submit".

MANAGE YOUR DAF ▾

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PAYMENT & CONFIRMATION

Jason June
123 main street
City, FL 18360

Purpose: Test June Account
Total Amount to be Charged: \$1,030.00

Payment Type Online Check Credit Card

Card Type

Card Number

Security Code
[What is this?](#)

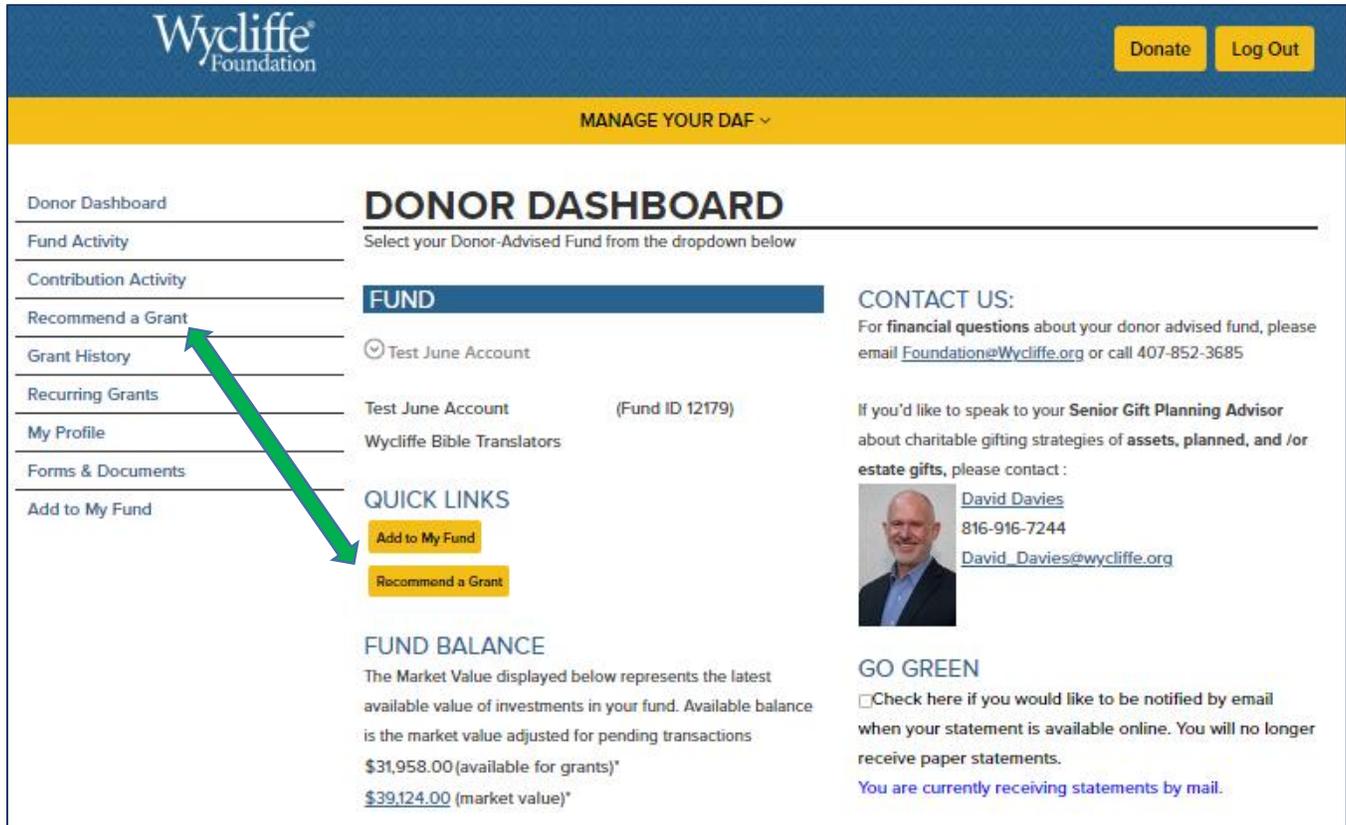
Exp. Month

Exp. Year

Comment(s):

Make a Grant from your DAF

Use the "Recommend a Grant" button to request a grant be made from your DAF account.



Wycliffe Foundation Donate Log Out

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DONOR DASHBOARD

Select your Donor-Advised Fund from the dropdown below

FUND

Test June Account

Test June Account (Fund ID 12179)

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QUICK LINKS

[Add to My Fund](#)

[Recommend a Grant](#)

FUND BALANCE

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[You are currently receiving statements by mail.](#)

On the "Recommend Grants" page, you can:

- Repeat a prior grant
- Create a new grant
- Search by charity name or key word
- Click on "New Grant" by one of those listed on the grantee list

➔ If you have multiple Donor Advised Funds, click the dropdown arrow under the blue "FUND" bar and select the DAF you would like to add funds to.

Wycliffe Foundation Donate Log Out

MANAGE YOUR DAF ▾

Donor Dashboard **RECOMMEND GRANTS**

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Contribution Activity

Recommend a Grant ➔

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FUND

Test June Account (Fund ID 12179)

Wycliffe Bible Translators

FUND BALANCE

The Market Value displayed below represents the latest available value of investments in your fund. Available balance is the market value adjusted for pending transactions

\$32,058.00 (available for grants)*

\$39,124.00 (market value)*

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RECOMMEND A GRANT / MANAGE MY GRANTEES

Note: Your designations must be for qualifying charitable organizations that are tax exempt under section 501(c)(3) of the Internal Revenue Code. Wycliffe Foundation reserves the right to reject grant requests for organizations that are not in line with Wycliffe's morals and Statement of Faith found on Wycliffe.org under About, [Our Beliefs](#).

SEARCH BY KEYWORD

Charity Name:

Keywords:

Submit

GRANTEE LIST

Use this table to keep track of your favorite grantees. To add a new grantee to your favorites list, click the "Add a Grantee" button. To remove a grantee from your list, click the "x". To recommend a grant, click the "New Grant" button beside the grantee name.

	GRANTEE	REMOVE GRANTEE
New Grant	4 2 20 FOUNDATION PO BOX 23027 RICHMOND, VA 23223	✗
New Grant	AFRICA INLAND MISSION P O BOX 3611 PEACHTREE CITY, GA 30269	✗
New Grant	AUSTIN OPERA 3009 Industrial Ter Ste 100 , Austin, TX 78758	✗
New Grant	HOPE COLLEGE 141 E 12TH STREET HOLLAND, MI	✗

If you use the search feature, you will see a link to Guidestar if you wish to find a different charity or research charities you may be interested in.

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ADD A GRANTEE

FUND

☑ Test June Account

Test June Account (Fund ID 12179)

Wycliffe Bible Translators

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If you are unable to find an organization using the search by Keyword, try our Guidestar search.

[Guidestar Organization Search](#)

If you are unable to find an organization using the Search by Keyword or [GuideStar Organization Search](#), you may [Suggest A Grantee](#) or return to the [Grantee List](#).

SEARCH RESULTS

NAME	FOCUS	ACTIONS	ACTIONS
Wycliffe Bible Translators		Details	New Grant
WYCLIFFE BIBLE TRANSLATORS, INC		Details	New Grant

SEARCH BY KEYWORD

Charity Name Keywords: 

Once you click on "New Grant", you will be directed to the "Grant Entry" page to enter the amount and any designation.

On the "Grant Entry" page:

- You can choose to make it a single or recurring grant.
- Enter the amount and grant date.
- **"Name of Contact"** box – This is if you have a contact at the charity that we can reach out to if we have questions about the grant purpose. This is not required.
- **"Grant Purpose"** box - Select Project, Member or General Support.
- **"Please Specify"** box – If you choose Project or Member, please include the project name/number or the member's name and number.
- The **"Information to Share"** section is what you want the charity to see.
 - You can make it anonymous if you wish.

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GRANT ENTRY

I would like to recommend a grant to:
WYCLIFFE BIBLE TRANSLATORS, INC

Address

Recommended Grant Amount:

As a Single Grant
 As a Recurring Grant

Available Balance \$4,926.63

Amount

Choose grant date:

Other Grant Recommendation Details:

Name of Contact

Grant Purpose

Please Specify

Information to Share:

Anonymous

Note:

Special Instructions:

- Click "Submit Grant" at the bottom of the "Grant Entry" page to continue to the confirmation page.

MANAGE YOUR DAF ▾

CONFIRM RECOMMENDATION

Grantee: WYCLIFFE BIBLE TRANSLATORS, INC
PO Box 628200, ORLANDO, FL 32862-8200

Grant Amount: single payment for \$100.00

Grant Purpose: General Support

By clicking the Confirm Grant Recommendation button, I understand and acknowledge that a and fully support a charitable program and a Grant may not be used for any of the following:

- To provide private benefit to me or any other related individual
- To pay for dues, membership fees, or a pledge
- To purchase tickets to a charitable event or benefit, such as banquets, golf tournament sponsorships
- To pay for school tuition – apart from an established scholarship program
- To support organizations on the terror-watch list
- To support a political party or candidate for election

Note: Your designations must be for qualifying charitable organizations that are tax exempt under section 501(c)(3) of the Internal Revenue Code. Wycliffe Foundation reserves the right to reject grant requests for organizations that do not align with Wycliffe's morals and Statement of Faith found on Wycliffe.org under About, [Our Beliefs](#).

Your grant request is NOT submitted until you click the Confirm Grant Recommendation button.

[Cancel](#) [Edit Grant](#) [Confirm Grant Recommendation](#)

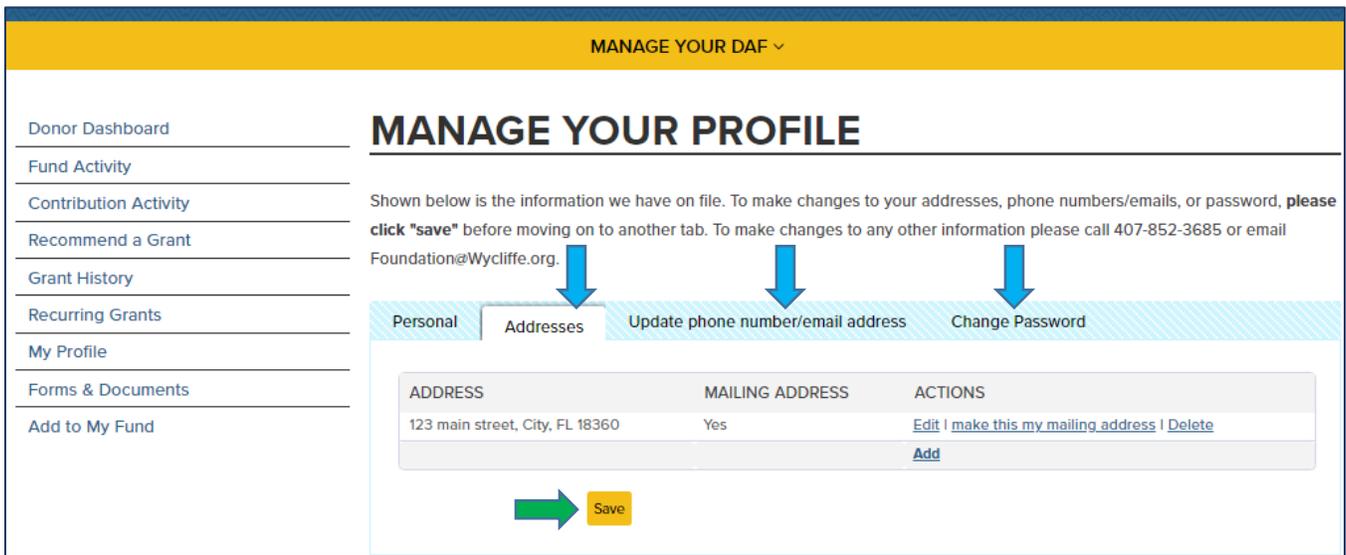
- If everything looks good, click on "Confirm Grant Recommendation" to submit your grant request.

Update your Profile (address, phone, email, password)

Select "My Profile" from side menu or drop down and then choose the item to update. You may:

- Update your mailing address
- Update your email address
- Update your phone number
- Change your Password

 You will need to click the "Save" button BEFORE moving to another tab to make another change.



MANAGE YOUR DAF

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MANAGE YOUR PROFILE

Shown below is the information we have on file. To make changes to your addresses, phone numbers/emails, or password, **please click "save"** before moving on to another tab. To make changes to any other information please call 407-852-3685 or email Foundation@Wycliffe.org.

Personal | **Addresses** | Update phone number/email address | Change Password

ADDRESS	MAILING ADDRESS	ACTIONS
123 main street, City, FL 18360	Yes	Edit make this my mailing address Delete
Add		

 [Save](#)