



## FEATURE LIST

### Dashboard

- Real-time Current Year Giving Summary
- Family Mission
- Lifetime Giving Statistics
- Top Causes
- Giving account(s) balances
- Recent grant planning activity
- Goals & Budget Progress, including the Private Foundation 5% Minimum Distribution
- View-only summaries of Private Foundation Qualified Expenses and categories

### “Give now” – Making Grants and Gifts

- Unified and Integrated Grant Planning, Execution and Tracking
- 3-step, easy to use, grant-setup wizard
- One process for any funding source
- Create grant “drafts” for planning, review and approval
- Manage multi-year pledges, recurring or installment grants
- Handle unrestricted gifts, special programs or funds, Galas & Events, anonymous gifts, etc.
- Integrated payments execution and real-time tracking
- Simple, “right-sized” approvals process for your family
- Permissions-based security
- Capture donor/family intentions for Multi-Gen legacy
- Tag grants for easy reporting, classification, search, etc.
- One-click uploads and tracking of gift-acknowledgment letters
- Includes tracking of credit-card, cash, or in-person donations
- Send funds via U.S. Mail paper checks, EFT or “Grantee’s choice”
- Auto-generate key documents (Grant agreements, Award Letters, etc.)

### Grant Activity

- Search or filter for any past grant or grants
- Quick access to all key fields:
  - Family members, bank accounts, special programs, grant and payment status, tags, etc.
- Summary statistics on amounts funded, in-progress or under consideration
- Complete import of prior giving history as part of new client onboarding

### Payments

- View upcoming payments by time, recipient, approval status, etc.
- See real-time payment status and quickly identify un-acknowledged or delayed grants
- Create custom views and summaries.
- Export to Excel or PDF
- Email alerts and communications on upcoming and in-progress payments

### Charity Search & Discovery

- Powerful and easy search engine for >1.7 million U.S. public charities
- Embedded GuideStar Pro subscription for all users
- Real-time IRS compliance validation
- Easily find bookmarked or past grantees
- Key charity contact information, past tax filings and due diligence support



## Charity/Grantee relationship management

- Unified history and summary of your relationship with a charity/grantee
- Family grant histories across members and accounts
- Contextual Notes, Document storage and search
- Key Contact information

## Reporting & Analytics

- Customized reports
- Bespoke terms and classifications
- Planning: family goals, budgets and progress
- Customizable pages for family members, cause (passion) areas, strategies or other tags

## Advisor Portal (single/multi-family office admin and operation support, accountants, trusts & estates attorneys, wealth advisors, philanthropy consultants, etc.)

- Cross-client summaries and key insights
- View client upcoming payments and activity
- Branded custom client reports
- Search and find cross-client alignment and impact opportunities

## Private Foundations

- Mandatory 5% Distribution Rule tracking
- Integrated audit trail of grantmaking progress
- View-only summaries of Private Foundation Qualified Expenses and categories

## Tax, Compliance & Audit Support

- Automatic "Schedule A" (charity itemization form for tax filing) deductions
- Grant exports for 990-PF (private foundation IRS filing)
- Integrated IRS non-profit and deductibility status "certificates"
- Audit tracking of data entry and approvals
- Integrated document management of key grant requests, approvals, receipts, etc.
- Automated requests and tracking for grantee acknowledgment letters

## Security, Integrations and Technical Highlights

- Cloud-based architecture, nothing to install
- 2-factor user authentication
- User Permissions and restrictions
- Grant and payment exports for QuickBooks, Sage Intacct, or custom

## Coming 2023:

- Additional ways to impact (recoverable grants via donor-advised funds, mission and program-related investments, Hardship/Disaster Relief, International grants)
- Fiscal sponsor tracking
- Enhanced due diligence data and support
- ...more!