How to Recommend Grants through The ImpactAssets Donor Advised Fund

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INVEST WITH MEANING

The ImpactAssets Donor Advised Fund makes it easy to recommend grants to charities you care about. You can recommend single and recurring grants through our online platform, DonorWeb, or submit grant recommendations by mail, fax or by scanning a Grant Recommendation Form to ImpactAssets.

Grant Minimum
Recommend grants of $250 or more.

Eligibility
Grants may be recommended to all charitable organizations that are tax-exempt under IRC Section 501(c)(3) and are public charities under Code Section 509(a). Review the ImpactAssets Donor Advised Fund Program Circular for more information about our granting policies.

Online Instructions

1. **Login** to DonorWeb. *The login button is also on the top right corner of the ImpactAssets website*

   If you need to reset your DonorWeb login information, please contact ImpactAssets Client Services at clientservice@impactassets.org or 855.482.2946.

2. Navigate to the **Recommend Grants** page from the menu on the left.

3. At the bottom of the page, click the **Add a Charity** button.

4. Use the search field to find the charity that you want to support. Search by the charity's name. If the charity appears in the search results, click on its name to add it to your list of charities.

   If you are unable to find the charity, click on the **Suggest a Charity** link and follow the instructions to suggest a new charity for our database.

5. After finding or suggesting the charity, it will appear at the bottom of the **Recommend Grants** page. Click the **New Grant** button next to the charities name that you want to support.

6. Fill out the online Grant Recommendation Form. Here you can select to make a single or recurring grant and the date that you would like the grant disbursed from your account.

7. Once you have filled out the form, click **Submit** at the bottom of the page.

8. **Confirm** the grant on the following page in order to complete your grant recommendation.

   If your grant was submitted properly, it will appear on your Grant History page. You will also receive a confirmation email at the email address listed in your account. Our team reviews recommendations weekly by close of business on Tuesdays. If approved, payment will be processed at the end of the week.