



Donor Portal Guide

www.cfsloco.org

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Need Assistance?

If you have any questions about the Fundholder Portal or experience any issues accessing information, please contact our Donor Services Team at donorservices@cfsloco.org or (805)-543-2323.

Fundholder Portal Guide

Fundholder Portal

As a fund holder, you can access your fund information online through our Fundholder Portal. Within the portal, you can easily check your fund balance, view and download fund statements, recommend and track grants, give to your fund and more. The Fundholder Portal makes it easy to manage your funds and is available 24/7 from anywhere, on any device.

Initial Login Process and Creating Your Account

You will receive an email from The Community Foundation San Luis Obispo County with a custom invitation link to create your account in the Fundholder Portal. Your username will be the email address you received the invitation link to. If you would like to change the email linked to your account, please contact our Donor Services team at donorservices@cfsloco.org. Once you click on the invitation link, you will be prompted to create a password of your choice.

Setup Access
Please setup a password to use to access your account.

Name	Smith, Mrs. Jane B.
Login	jane.smith@gmail.com
Password	
Confirm Password	

Save

Returning Users

To access the Fundholder Portal, visit our website at www.cfsloco.org and click the Login button in the top right corner of the page. You will be redirected to a login page where you will enter your unique username and password. If you forgot your login information, please contact our Donor Services team at donorservices@cfsloco.org. While our team can assist you with resetting your password, please understand we do not have access to user passwords and cannot look them up for you.

Donor Portal Features

Fund Summary: Your homepage is a quick snapshot of your fund's most recent activity. It will show your fund's current balance, the spendable amount, all fund advisors, recent contributions and recent grant history.

Gifts Received: This tab shows all contributions made to your fund. Clicking on a contributor's name will bring up their history of contributions including date of gift and amount.

Grant History: This tab shows the history of grants awarded from your fund including date, organization name, purpose, and amount.

Grant Status: This tab allows you to make a grant recommendation from your fund and view recent grant statuses (not available for scholarship funds).

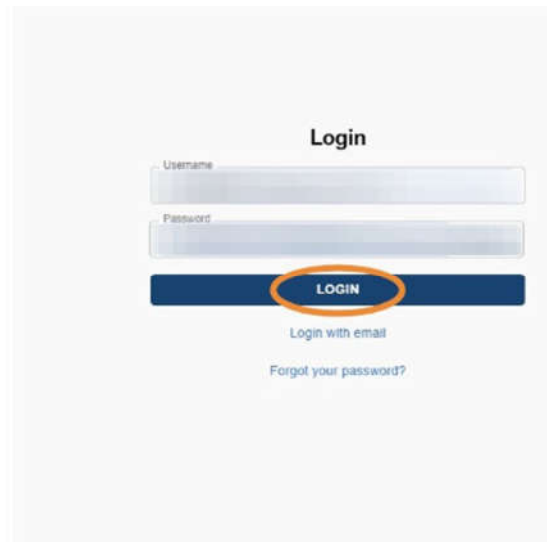
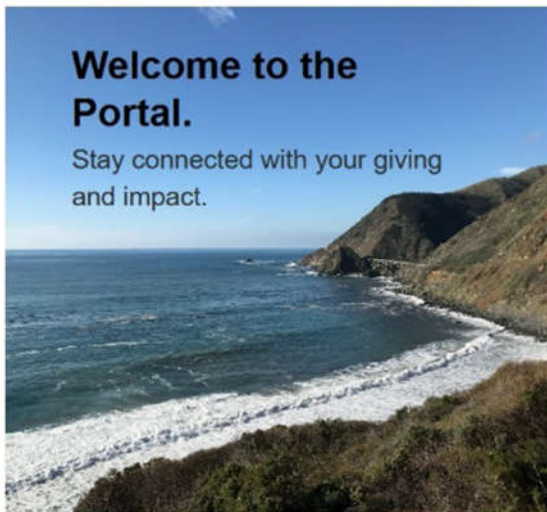
Fund Statements & Resources: This tab shows your fund statements in PDF format. The Resources and Investment Reports subtab shows the investment performance report, guides to assist with portal navigation, a fund amendment request form and more.

Give and Get Involved: This tab will redirect you to our giving and foundation events page. There you can search for and give to our featured funds or buy tickets for an upcoming event.

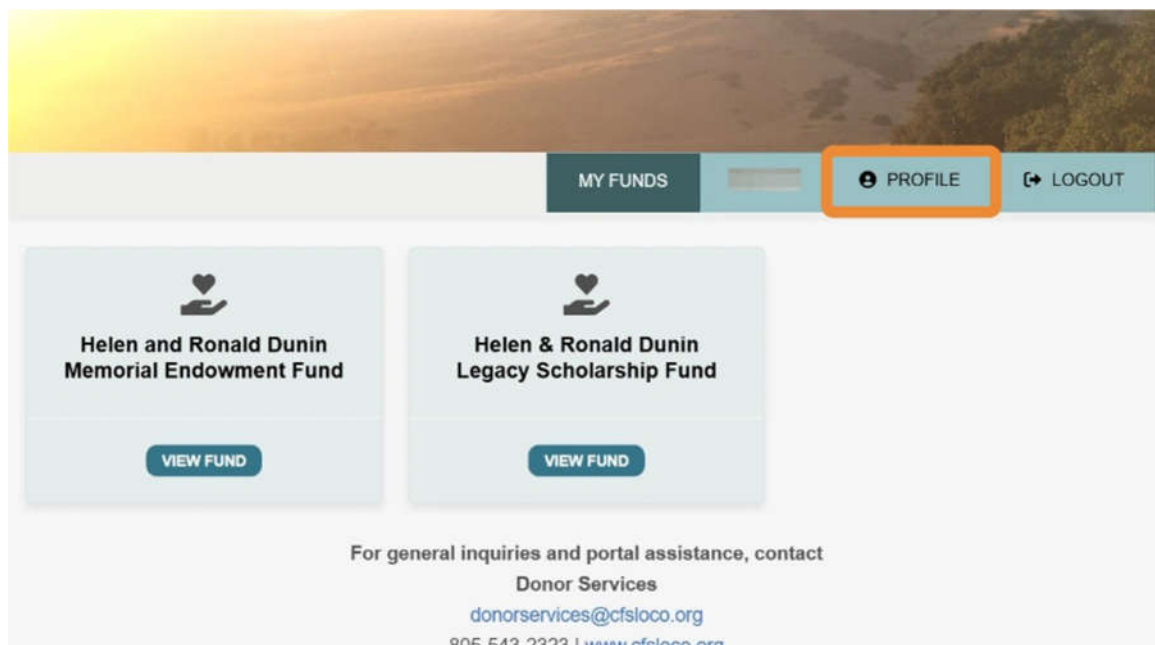
How to Change my Username and Password

This guide helps you change your username and/or password in the Portal.

1. Navigate to the Portal Login Page.
2. Enter your username and password. Then click "Login".

A login form titled "Login". It contains two input fields: "Username" and "Password". Below the fields is a blue button labeled "LOGIN", which is circled in orange. Underneath the button are links for "Login with email" and "Forgot your password?".

3. Click the "Profile" tab on the upper right-hand side.



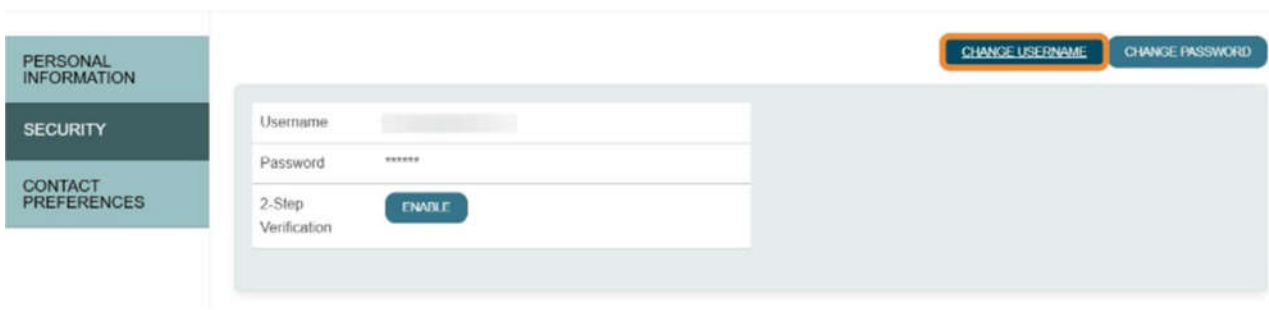
4. Click the "Security" tab on the left-hand side.



The screenshot shows a user profile page. At the top, there are tabs for "MY FUNDS", "PROFILE", and "LOGOUT". On the left-hand side, there is a vertical menu with three tabs: "PERSONAL INFORMATION", "SECURITY", and "CONTACT PREFERENCES". The "SECURITY" tab is highlighted with an orange border. To the right of the menu, there is a form with fields for "Name", "Primary Address", "Email", and "Phone Number". An "EDIT INFORMATION" button is located in the top right corner of the form area.

Follow the steps below to change your username.

5. Click "Change Username" on the upper right-hand side.



The screenshot shows the "Security" page. On the left-hand side, there is a vertical menu with three tabs: "PERSONAL INFORMATION", "SECURITY", and "CONTACT PREFERENCES". The "SECURITY" tab is highlighted. To the right of the menu, there is a form with fields for "Username", "Password", and "2-Step Verification". The "2-Step Verification" field has an "ENABLE" button. In the top right corner of the form area, there are two buttons: "CHANGE USERNAME" and "CHANGE PASSWORD". The "CHANGE USERNAME" button is highlighted with an orange border.

6. Enter your new username in the text box. Then click "Change Username."

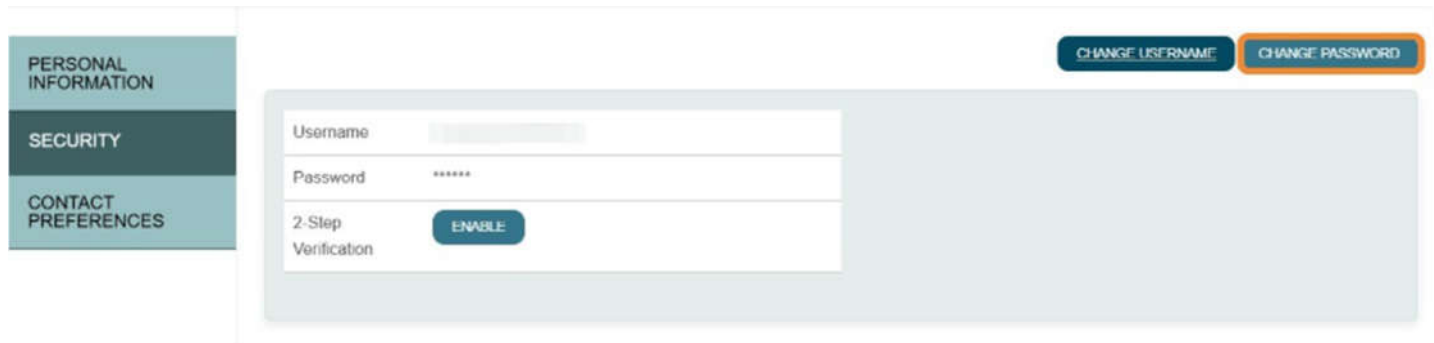
Security > Change Username



The screenshot shows a close-up of the "Change Username" form. It features a text box labeled "Username" and a large blue button labeled "CHANGE USERNAME". The button is highlighted with an orange oval.

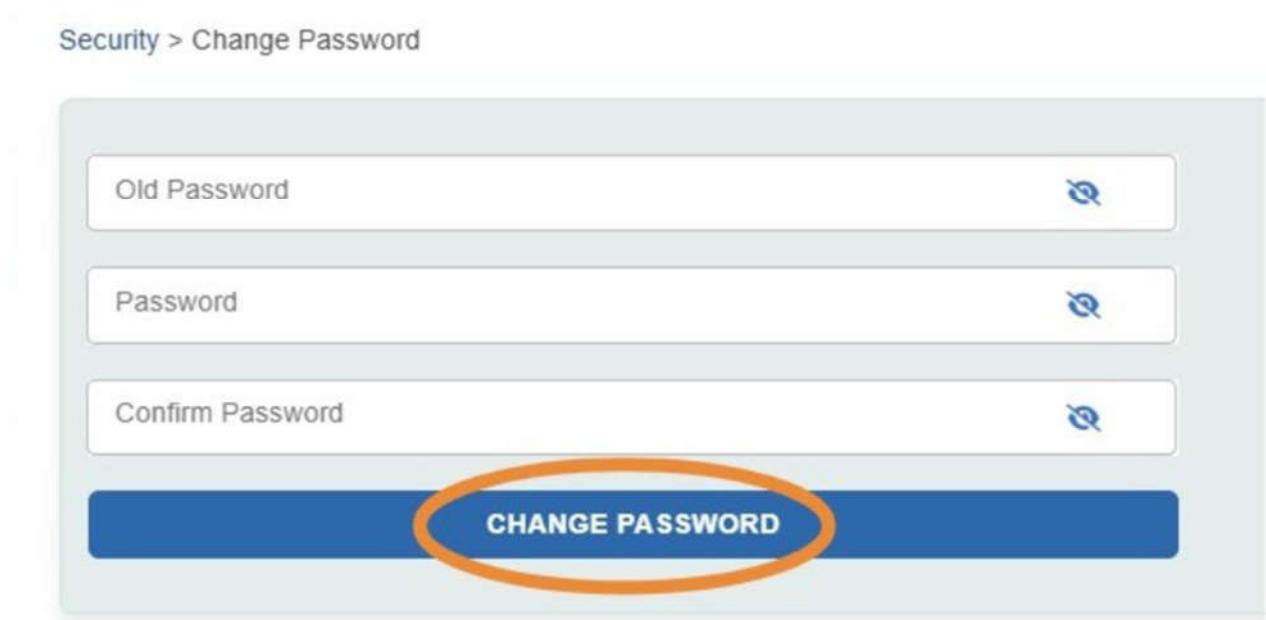
Follow the steps below to change your password.

7. Click "Change Password" on the upper right-hand side.



A screenshot of a user profile page. On the left is a sidebar with three menu items: 'PERSONAL INFORMATION', 'SECURITY', and 'CONTACT PREFERENCES'. The 'SECURITY' item is highlighted. On the right, there are two buttons: 'CHANGE USERNAME' and 'CHANGE PASSWORD'. The 'CHANGE PASSWORD' button is highlighted with an orange border. Below these buttons is a form with fields for 'Username', 'Password', and '2-Step Verification' (with an 'ENABLE' button).

8. Enter your old password in the first text box and your new password in the middle and bottom text boxes. Then, click "Change Password."



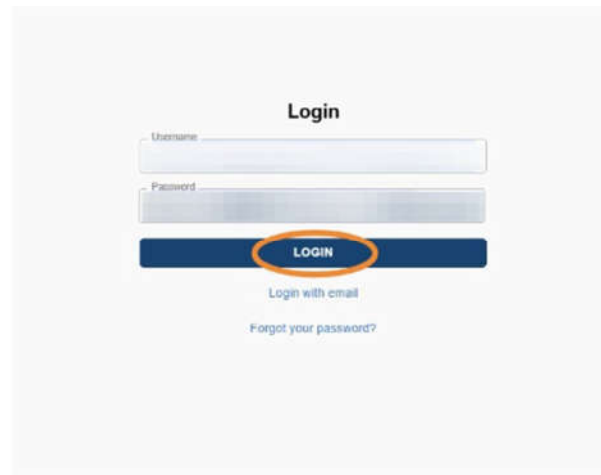
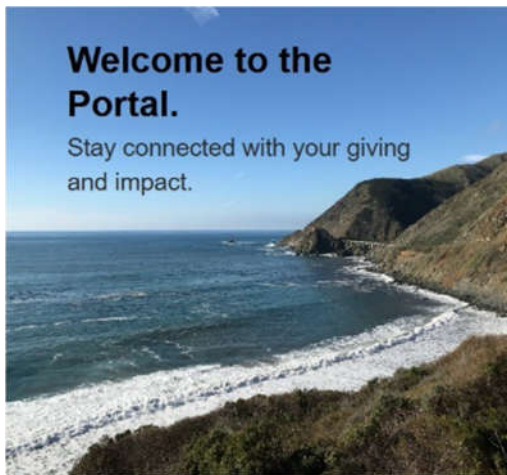
A screenshot of the 'Change Password' form. At the top, it says 'Security > Change Password'. The form contains three text input fields: 'Old Password', 'Password', and 'Confirm Password'. Each field has a blue eye icon to its right. At the bottom of the form is a large blue button labeled 'CHANGE PASSWORD', which is circled in orange.

If you do not know your old password, please contact our Donor Services team at donorservices@cfsloco.org or 805-543-2323.

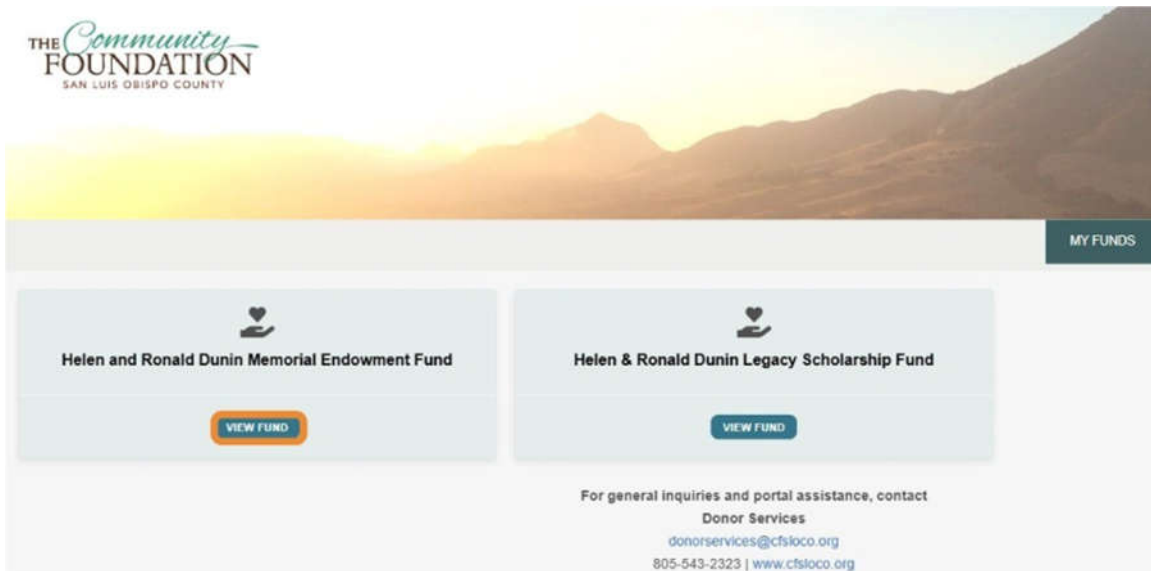
Where to View My Fund Balance

This guide helps you view your fund balance in the Fundholder Portal.

1. Navigate to [Portal Login Page](#).
2. Enter your username and password. Then click "Login".

A screenshot of the login page. It has a "Login" heading. Below it are two input fields: "Username" and "Password". A blue "LOGIN" button is positioned below the password field, with an orange circle highlighting it. Below the button are two links: "Login with email" and "Forgot your password?".

3. If you have multiple funds, select the desired fund by clicking "View Fund".

A screenshot of the Fundholder Portal dashboard. At the top left is the logo for "THE Community FOUNDATION SAN LUIS OBISPO COUNTY". The background is a warm, golden sunset over mountains. On the right side, there is a dark blue button labeled "MY FUNDS". Below this, there are two light blue boxes, each representing a fund. The first box is for the "Helen and Ronald Dunin Memorial Endowment Fund" and the second is for the "Helen & Ronald Dunin Legacy Scholarship Fund". Each box contains a "VIEW FUND" button, with the first one highlighted with an orange border. At the bottom, there is contact information for Donor Services: "donorservices@cfsloco.org", "805-543-2323", and "www.cfsloco.org".

4. View your Spendable and Current Balance amounts.

The screenshot shows the website for The Community Foundation San Luis Obispo County. The header features the organization's logo and a scenic mountain background. A navigation bar includes links for MY FUNDS, PROFILE, and LOGOUT. The main content area displays the Fund Summary for the Helen and Ronald Dunin Memorial Endowment. On the left, a sidebar lists various fund-related options. The main content area shows the Fund Created date (03/15/2001), the Current Balance (3,159,761.18), and the Spendable Balance (87,411.52). Callouts explain that the Current Balance is the total dollar amount in the fund, and the Spendable Balance is the dollar amount currently available for grants. At the bottom, contact information for Ms. Michelle Fries, Director of Grants and Programs, is provided.

Tab	Value	Description
Current Balance	3,159,761.18	This is the total dollar amount in your fund.
Spendable Balance	87,411.52	This is the dollar amount currently available for grants.

Tip! Your fund balances will always be available on the left-hand "Fund Summary" tab.

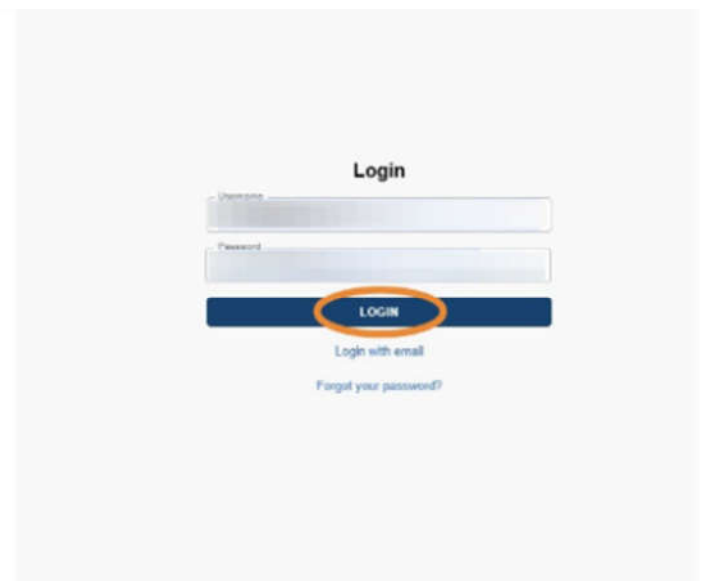
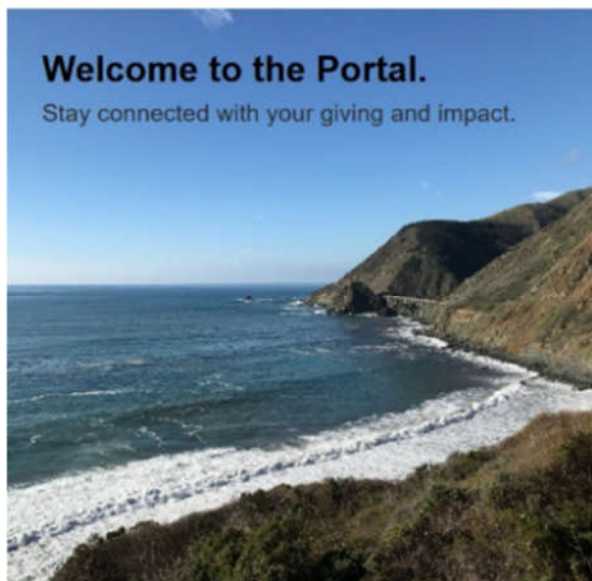
This screenshot is identical to the one above, showing the Fund Summary for the Helen and Ronald Dunin Memorial Endowment. The 'FUND SUMMARY' tab in the left-hand sidebar is highlighted with an orange border, indicating it is the active tab. The main content area displays the Fund Created date (03/15/2001), the Current Balance (3,159,761.18), and the Spendable Balance (87,411.52). Contact information for Ms. Michelle Fries is also visible at the bottom.

How to Give to My Fund

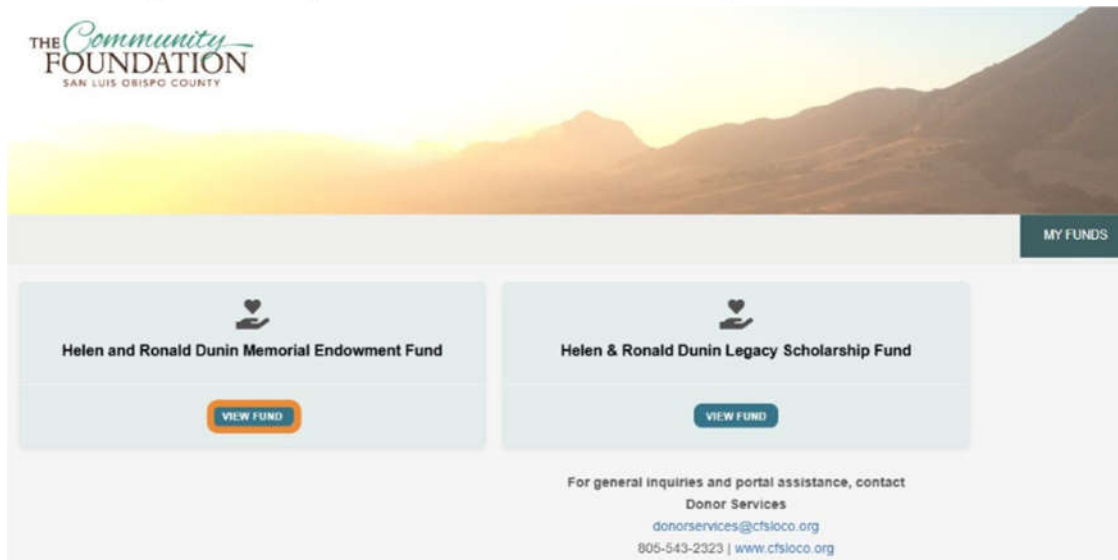
This guide assists you with making a gift to your fund through the Fundholder Portal. We accept credit or debit card payments in the portal. We can accept gifts of real estate, IRA contributions, and stock gifts, but you'll need to contact our Donor Services team to facilitate the gift.

An external giving page can also be shared with your friends and colleagues that may want to participate with an online gift. Please contact us to learn more. Checks can be mailed to our office, made out to Community Foundation San Luis Obispo County with the name of your fund in the memo line.

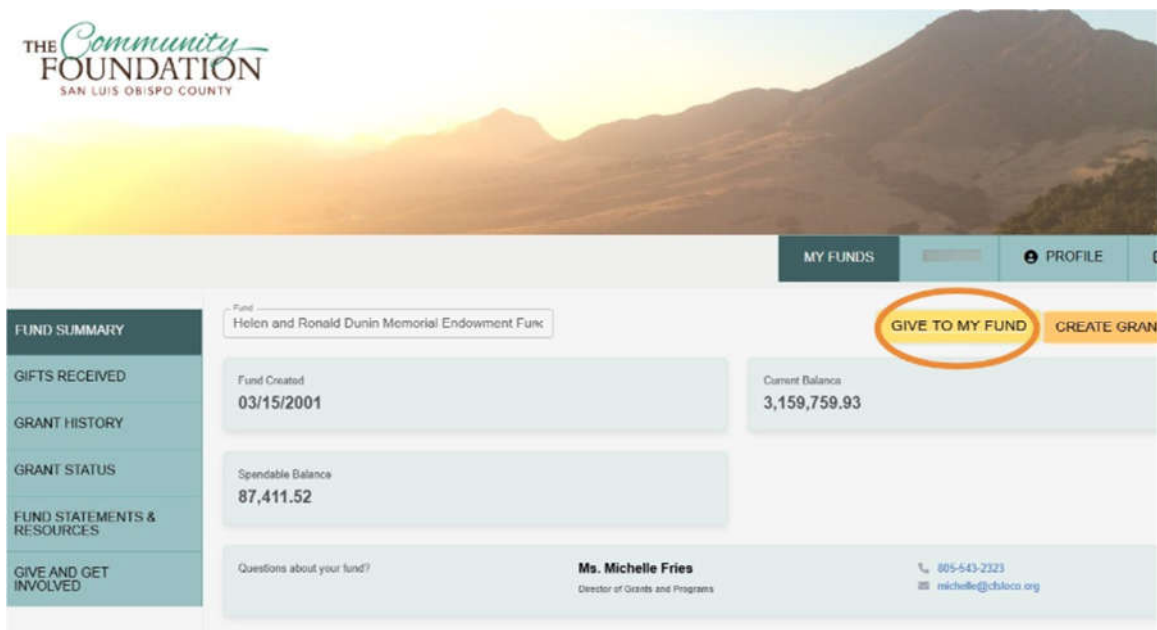
1. Navigate to the [Portal Login Page](#).
2. Enter your username and password. Then click "Login".



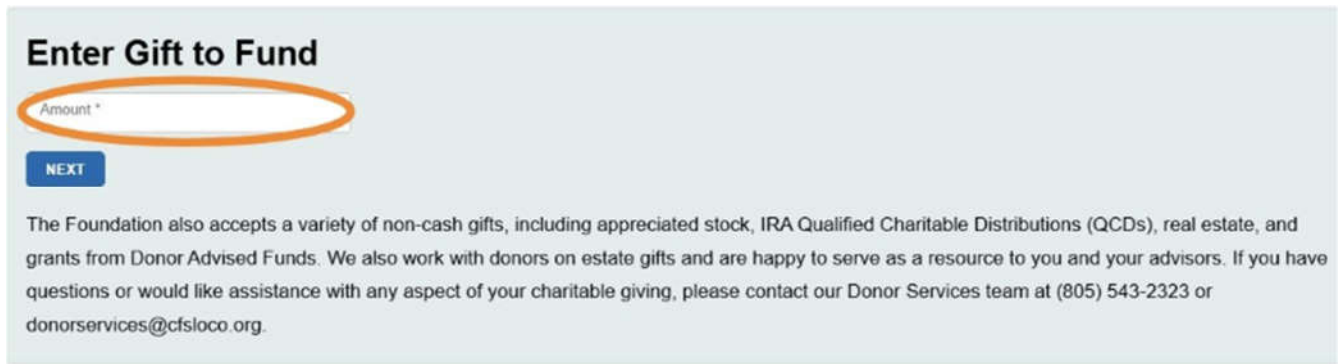
3. If you have multiple funds, select the desired fund by clicking "View Fund".



4. Click the "Give to My Fund" button on the upper right-hand side.



5. Enter your gift amount.



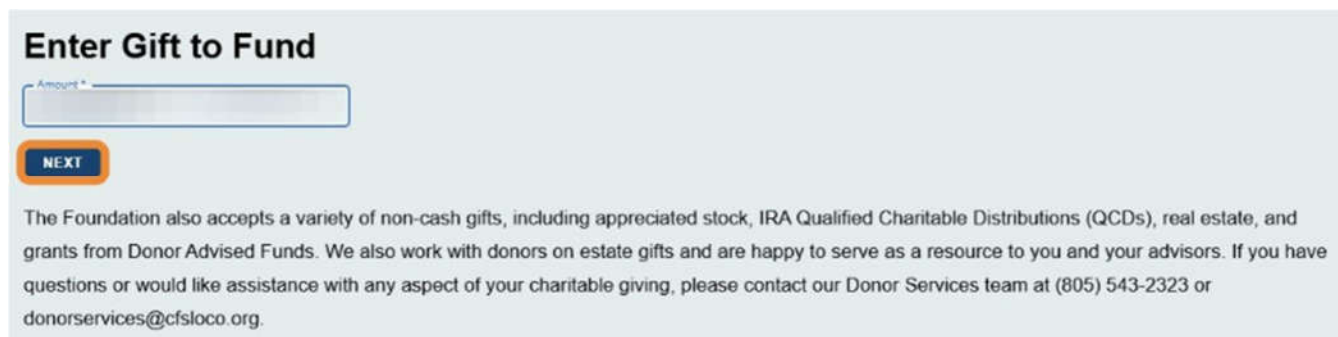
Enter Gift to Fund

Amount *

NEXT

The Foundation also accepts a variety of non-cash gifts, including appreciated stock, IRA Qualified Charitable Distributions (QCDs), real estate, and grants from Donor Advised Funds. We also work with donors on estate gifts and are happy to serve as a resource to you and your advisors. If you have questions or would like assistance with any aspect of your charitable giving, please contact our Donor Services team at (805) 543-2323 or donorservices@cfsloco.org.

6. Click "Next".



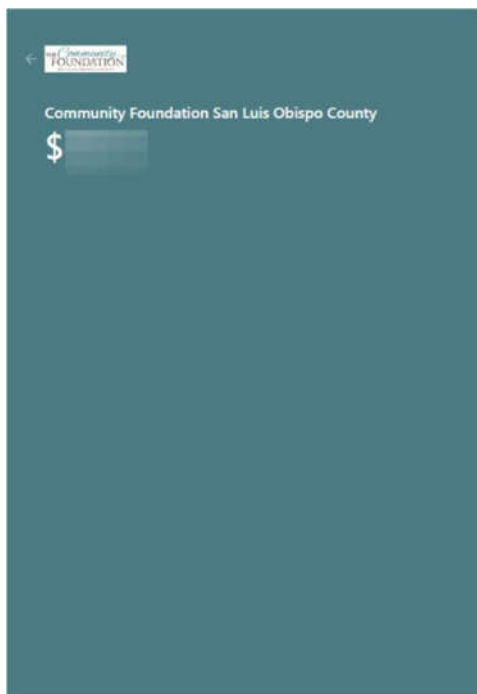
Enter Gift to Fund

Amount *

NEXT

The Foundation also accepts a variety of non-cash gifts, including appreciated stock, IRA Qualified Charitable Distributions (QCDs), real estate, and grants from Donor Advised Funds. We also work with donors on estate gifts and are happy to serve as a resource to you and your advisors. If you have questions or would like assistance with any aspect of your charitable giving, please contact our Donor Services team at (805) 543-2323 or donorservices@cfsloco.org.

7. Enter your card information.



Pay with card

Email

Payment method

Card

Card information

1234 1234 1234 1234

VISA

MM / YY

CVC

Cardholder name

Full name on card

Billing address

United States

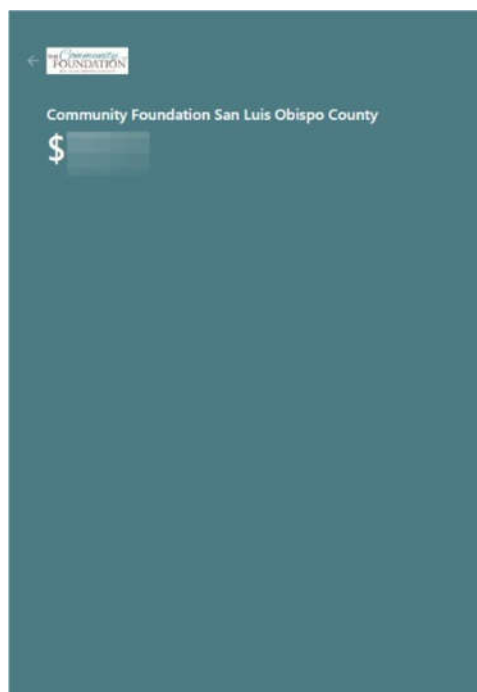
Address

[Enter address manually](#)

Pay

Powered by stripe | [Terms](#) | [Privacy](#)

8. Click "Pay".



Pay with card

Email

Payment method

Card

Card information

1234 1234 1234 1234

VISA

MM / YY

CVC

Cardholder name

Full name on card

Billing address

United States

Address

[Enter address manually](#)

Pay

Powered by stripe | [Terms](#) | [Privacy](#)

Transaction Verification

9. Click the donation ID to view transaction details.

The screenshot shows a web interface for a fund. On the left is a sidebar with menu items: FUND SUMMARY, GIFTS RECEIVED (highlighted), GRANT HISTORY, GRANT STATUS, FUND STATEMENTS & RESOURCES, and GIVE AND GET INVOLVED. The main content area is titled 'Donations' and shows a table with columns: ID, Date, Contributor, and Type. The first row has ID '42287' (circled in orange), Date '06/17/2026', Contributor 'Hauser, Audrey', and Type 'Stripe'. Above the table is a dropdown for '10 entries per page'. At the bottom, it says 'Showing 1 to 10 of 45 entries'.

ID	Date	Contributor	Type
42287	06/17/2026	Hauser, Audrey	Stripe

10. View transaction details.

The screenshot shows the 'Donation' details page. The sidebar is the same as in the previous screenshot. The main content area is titled 'Donation' and contains a form with the following fields:

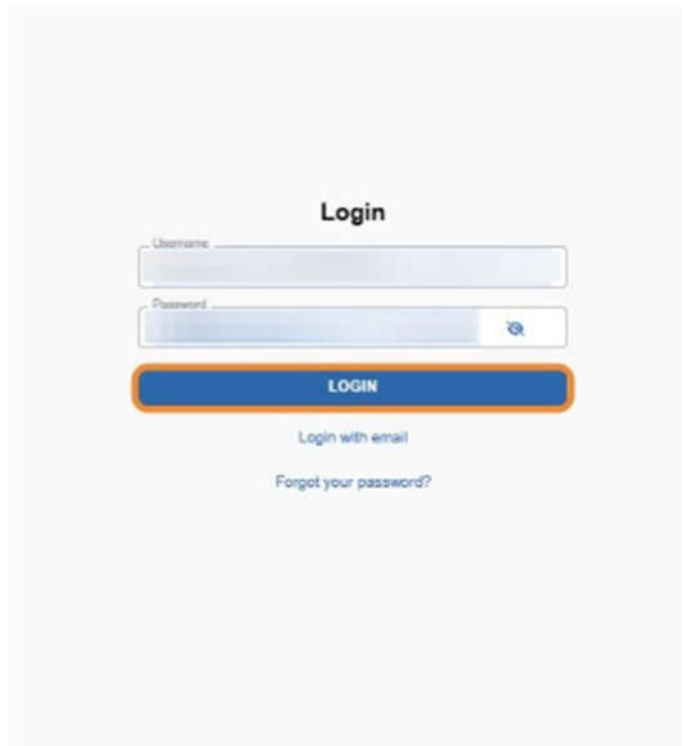
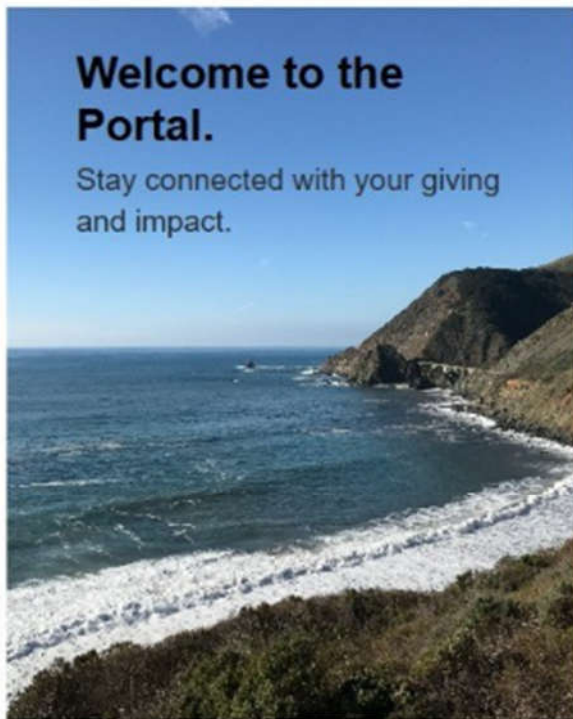
DonationID	42287
Donation Date	06/17/2026
Fund	Helen and Ronald Dunin Memorial Endowment Fund
Anonymous	No
Advisor	
Amount	
Recognition Name	

How to Create and Track Grant Requests

This guide helps you create, modify, submit, and track grant requests in the Fundholder Portal.

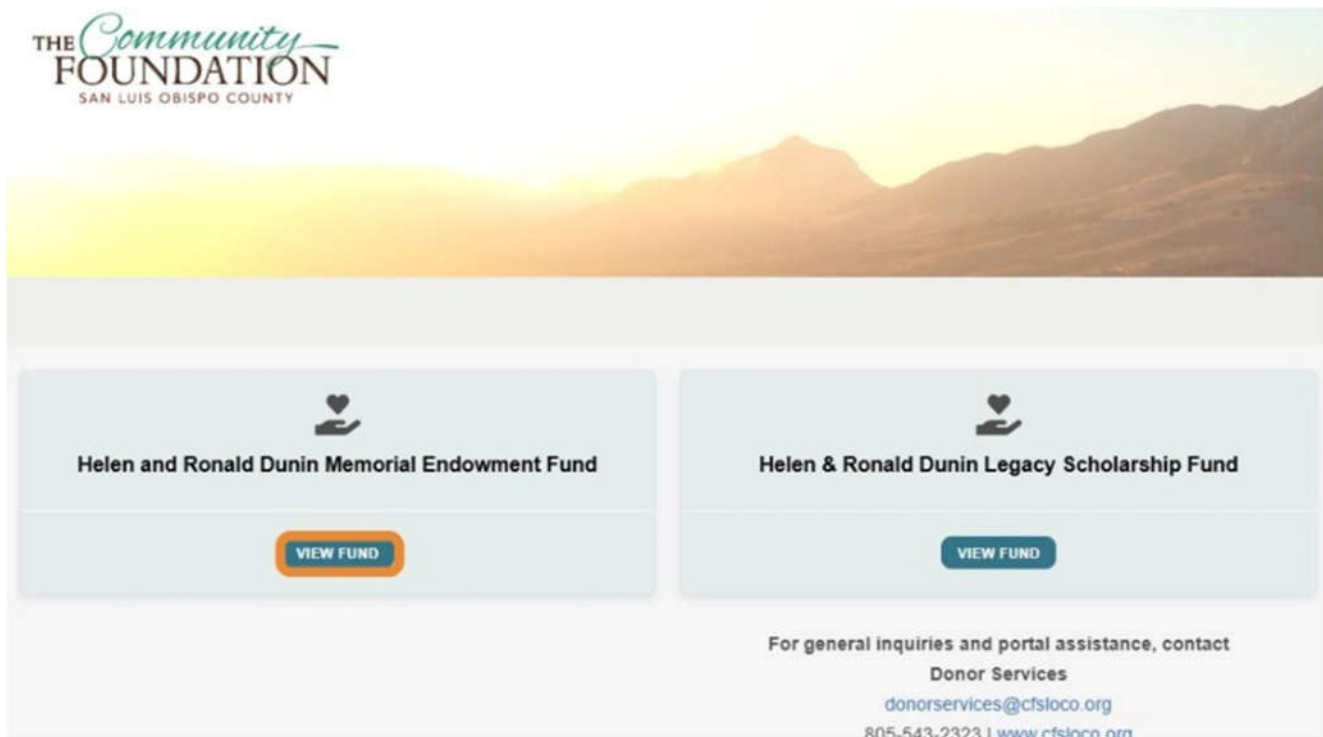
Step 1: Log into Fundholder Portal.

- Navigate to the [Portal Login Page](#).
- Enter your username and password. Then click "Login."

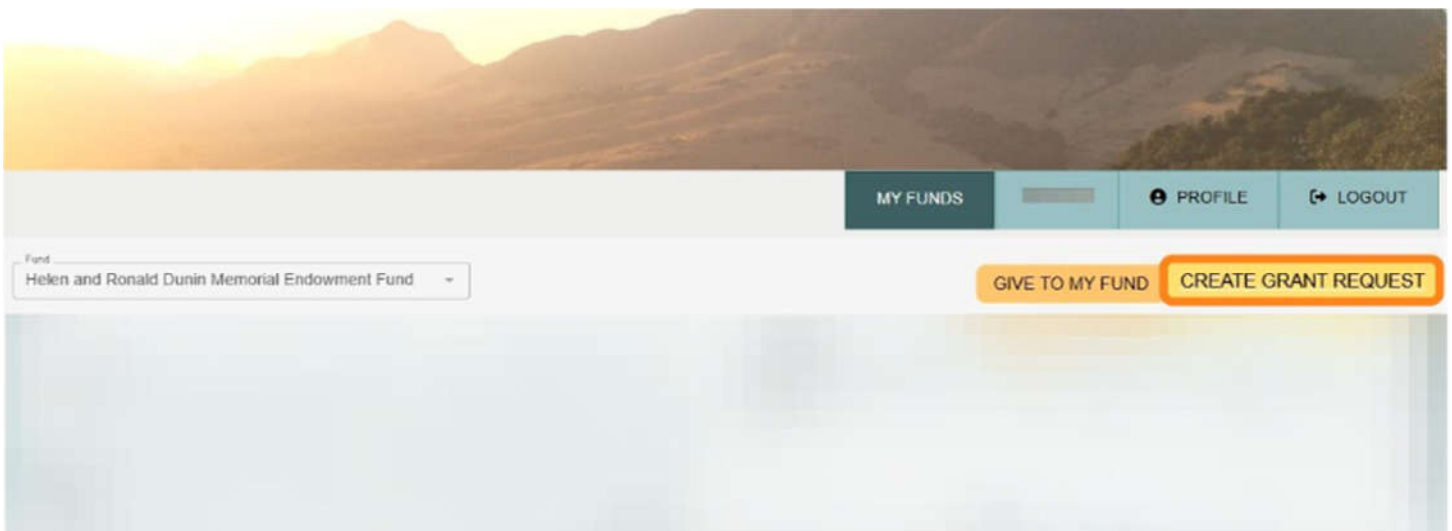
A screenshot of the Fundholder Portal login page. The page has a light gray background. At the top center, the word "Login" is displayed in a bold, black font. Below it are two input fields: the first is labeled "Username" and the second is labeled "Password". The password field has a small eye icon to its right. Below the input fields is a large, blue button with the word "LOGIN" in white, bold, uppercase letters. Below the button, there are two links: "Login with email" and "Forgot your password?", both in a smaller, blue font.

Step 2: Navigating Your Fund.

- If you have multiple funds, select the desired fund by clicking "View Fund."



- Click "Create Grant Request" on the top righthand corner.



Step 3: Select Organization Entry Method.

and Helen and Ronald Dunin Memorial Endowment Fund

GIVE TO MY FUND CREATE GRANT REQUEST

nt Request > Choose Type

PREVIOUS GRANTEE OR FUND **SEARCH GRANTEE** **MANUAL GRANTEE**

Select an organization you've previously granted to or a featured fund of The Community Foundation.

Search The Community Foundation's database or a national nonprofit database, known as Candid. This option is best if you know the organization's tax identification (EIN) number.

Manually enter organization's name and address.

Step 3A: Previous Grantee or Fund.

- Click "Previous Grantee or Fund" to find an organization previously granted to or a featured fund of The Community Foundation.

PREVIOUS GRANTEE OR FUND **SEARCH GRANTEE** **MANUAL GRANTEE**

- Click the text box to select an organization or fund from the dropdown menu.

Choose from previous Grantees or Funds

Grantees you have given to in the past → Organizations you have previously granted to.

Foundation funds you have given to in the past → Funds you have previously granted to.

Other foundation funds → All featured funds at The Community Foundation.

- In this example, I chose ALF Food Pantry.

Choose from previous Grantees or Funds

Grantees you have given to in the past

ALF Food Pantry

Foundation funds you have given to in the past

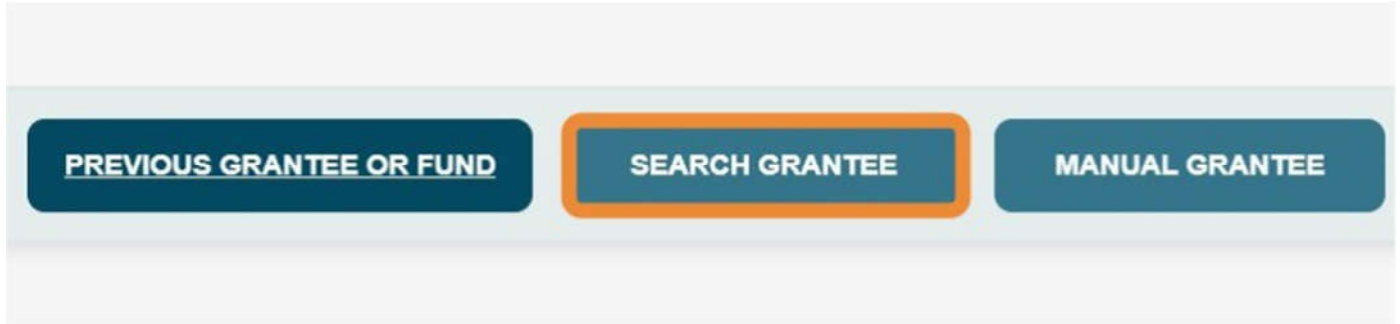
Other foundation funds



Skip to step 4 (page 23).

Step 3B: Grantee Search.

- Click "Search Grantee" to search for an organization in The Foundation's database or the national nonprofit database, known as Candid.



- Type in the organization's name in the "Grantee Name" field and any other known fields. Then click "Search."

A light blue form titled 'Search for Grantees'. It contains four input fields: a large 'Grantee Name' field at the top, a 'City' field, a 'State' field, and an 'EIN' field. Below these fields is a blue button with the word 'SEARCH' in white, which has an orange border.

Tip! If you know the tax identification (EIN) number, your search will be an easier process.

- Find the organization in our database.

Search Results for "ALF Food Pantry"

Click tab to search organizations in The Community Foundation's database.

COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY RESULTS CANDID RESULTS

	Name	Address	EIN
CREATE REQUEST	ALF Food Pantry	5411 El Camino Real Atascadero, CA 93422	77-0082730

1 - 1 of 1

Search for Grantees

Grantee Name
ALF Food Pantry

City State

EIN

[SEARCH](#)

- Find the organization in the national nonprofit database, known as Candid.

Search Results for "ALF Food Pantry"

Click tab to search the national nonprofit database, known as Candid.

COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY RESULTS CANDID RESULTS

	Name	Address	EIN
CREATE REQUEST	God's Pantry Food Bank, Inc.	2201 Innovation Dr Lexington, KY 40511	31-0979404
CREATE REQUEST	Connecticut Foodshare	2 Research Pkwy Wallingford, CT 06492	06-1063025
CREATE REQUEST	City Harvest, Inc.	150 52nd St Brooklyn, NY 11232	13-3170676
CREATE REQUEST	Second Harvest Foodbank of Southern Wisconsin	2802 Dairy Dr Madison, WI 53718	39-1490691
CREATE REQUEST	Community Food Bank of Central Alabama	107 Walter Davis Dr Birmingham, AL 35209	63-0837956

- Once the organization is found, click "Create Request."

Search Results for "ALF Food Pantry"

COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY RESULTS

CANDID RESULTS

Name
CREATE REQUEST ALF Food Pantry

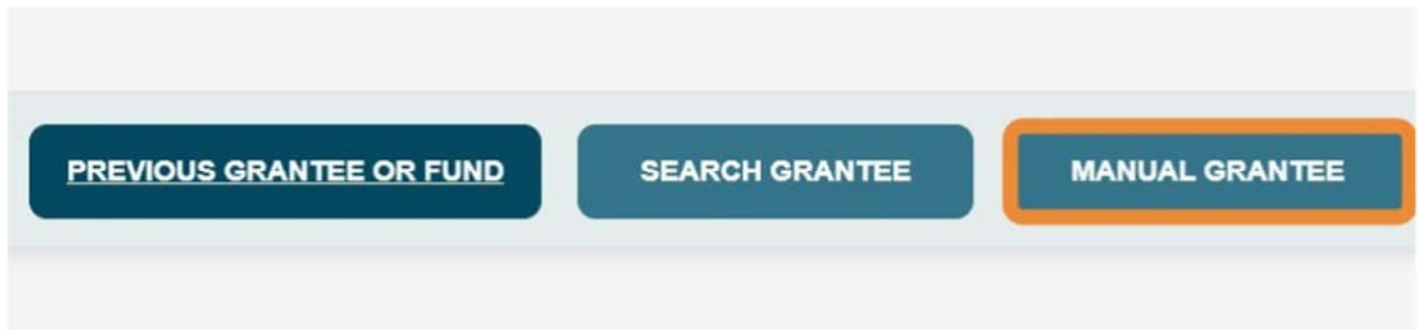
1 - 1 of 1



Skip to step 4 (page 23).

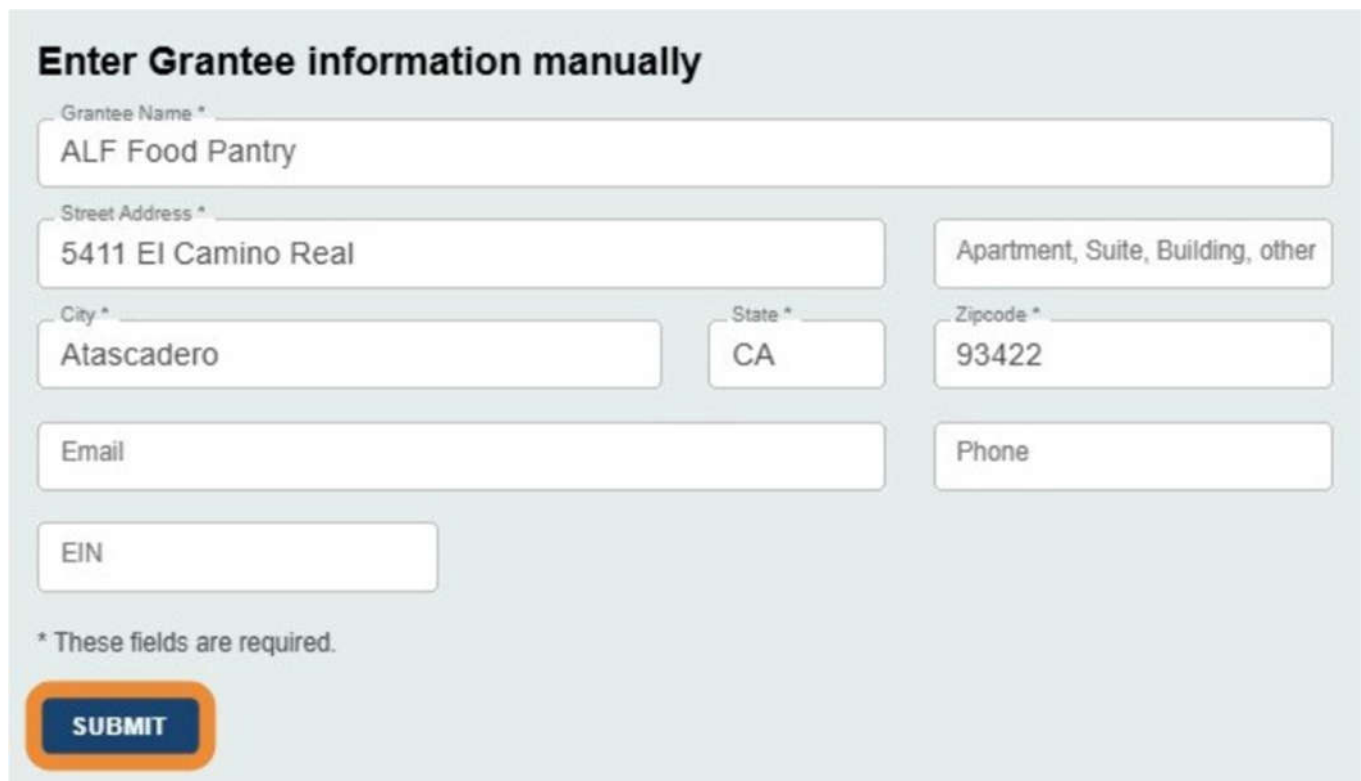
Step 3C: Manual Grantee.

- Click "Manual Grantee" to manually enter an organization's name and address.



Navigation buttons: **PREVIOUS GRANTEE OR FUND**, **SEARCH GRANTEE**, and **MANUAL GRANTEE** (highlighted with an orange border).

- Enter the organization's name, address, and any other known information. Then click "Submit."



Enter Grantee information manually

Grantee Name *
ALF Food Pantry

Street Address *
5411 El Camino Real

Apartment, Suite, Building, other

City *
Atascadero

State *
CA

Zipcode *
93422

Email

Phone

EIN

* These fields are required.

SUBMIT

Step 4: Enter the Grant Request Details.

- Select the purpose of the grant.

Grant Request

Grantee	ALF Food Pantry
Primary Contact	Mr. Tim Eckles
Address	5411 El Camino Real Atascadero, CA 93422
Purpose of Grant	☐ unrestricted ☐ restricted to support...
Amount	
Anonymous	☐
Recurring	☐

☐ Check this box if you're an organization requesting a distribution

ADD TO CART

Purpose of Grant Definitions:

Unrestricted: To support the organization's greatest needs.

Restricted: To support a specific program or purpose.

Tip! We recommend 'unrestricted' grants when possible, to give organizations flexibility to use funds where the needs are greatest.

- If "restricted to support..." is selected, please type in the specific program or purpose you would like the grant to contribute towards.

Grant Request

Grantee	ALF Food Pantry
Primary Contact	Mr. Tim Eckles
Address	5411 El Camino Real Atascadero, CA 93422
Purpose of Grant	☐ unrestricted ☒ restricted to support... Restricted to support (Specify program or purpose) 0/255 characters
Amount	
Anonymous	☐
Recurring	☐

Type in a specific program or purpose.

- Enter the grant amount. The minimum distribution amount is \$500.

Grant Request

Grantee	ALF Food Pantry
Primary Contact	Mr. Tim Eckles
Address	5411 El Camino Real Atascadero, CA 93422
Purpose of Grant	☐ unrestricted ☒ restricted to support... Restricted to support summer supplemental food for school children 66/255 characters
Amount	500
Anonymous	☐
Recurring	☐

- Please use the Grant Request Field Definitions table to add any additional details.

Fields	Definitions
Grantee	Name of organization receiving gift.
Primary Contact	Organization staff member who will oversee the grant facilitation.
Address	Organization mailing address.
Description (required)	What gift should be used for “Unrestricted”- To support the organization's greatest needs. “Restricted to support [program name]”- To support a specific program or purpose. We recommend putting grants as “unrestricted” to give organizations flexibility to meet their most pressing needs, whether it be program or internal sustainability related.
Amount (required)	Gift amount must be \$500.00 or more.
Anonymous	Check if you don't want your name and fund name shared with the organization receiving the grant. Please note, we <i>never</i> share your contact information unless specifically authorized by you.
Recurring	Check if you would like to make a recurring grant to an organization in the same amount for a specified time frame (monthly, quarterly, semi-annually, annually).
Check this box if you're an organization requesting a distribution	If you are an organization, you must attach documentation of board approval for your distribution request.

- If you are an organization requesting a distribution, you must check the bottom box and attach documentation of your board's approval.

Grant Request

Grantee	ALF Food Pantry
Primary Contact	Mr. Tim Eckles
Address	5411 El Camino Real Atascadero, CA 93422
Purpose of Grant	☐ unrestricted ☒ restricted to support... Restricted to support summer supplemental food for school children 66/255 characters
Amount	500
Anonymous	☐
Recurring	☐
Board Approval	Choose Files No file chosen (or drag and drop anywhere on the page) ☒ Check this box if you're an organization requesting a distribution ADD TO CART

Step 5: Modify Grant Requests (if needed).



All modifications must be made before submitting your grant requests. For further assistance contact Donor Services at donorservices.org.

How to delete a grant request:

From the Grant Status tab, click "Delete" to remove an unwanted request from the cart.

Fund
Helen and Ronald Dunin Memorial Endowment Fund

GIVE TO MY FUNDCREATE GRANT REQUESTCART (1)

Grant Request Cart

REVIEW GRANT REQUESTS

	Recipient	Description	Attachment	Amount	
DELETE	ALF Food Pantry Mr. Tim Eckles 5411 El Camino Real Atascadero, CA 93422	Restricted to support summer supplemental food for school children		500.00	EDIT
Grant Request Total				500.00	

How to edit your grant request:

From the Grant Status tab, click "Edit."

The screenshot shows the 'Grant Request Cart' section of a website. At the top, there's a header with a fund name 'Helen and Ronald Dunin Memorial Endowment Fund' and three buttons: 'GIVE TO MY FUND', 'CREATE GRANT REQUEST', and 'CART (1)'. Below the header, the 'Grant Request Cart' title is on the left, and a 'REVIEW GRANT REQUESTS' button is on the right. The main area is a table with columns: Recipient, Description, Attachment, and Amount. There is one row for a grant request to 'ALF Food Pantry' for \$500.00. To the left of the row is a 'DELETE' button, and to the right is an 'EDIT' button. At the bottom right of the table, it says 'Grant Request Total 500.00'.

Recipient	Description	Attachment	Amount
ALF Food Pantry Mr. Tim Eckles 5411 El Camino Real Atascadero, CA 93422	Restricted to support summer supplemental food for school children		500.00
Grant Request Total			500.00

Modify your request as needed. Then click "Update Cart."

The screenshot shows the 'Grant Request' form. It has several sections: 'Grantee' (ALF Food Pantry), 'Primary Contact' (Mr. Tim Eckles), 'Address' (5411 El Camino Real, Atascadero, CA 93422), 'Purpose of Grant' (radio buttons for 'unrestricted' and 'restricted to support...', with a text box for the restricted purpose: 'Restricted to support summer supplemental food for school children'), 'Amount' (500), 'Anonymous' (checked), and 'Recurring' (unchecked). A blue arrow points from the 'Anonymous' checkbox to a text box that says 'In this example, I checked anonymous to prevent my name and fund's name from being shared with the organization receiving the grant.' At the bottom, there's a checkbox for 'Check this box if you're an organization requesting a distribution' and an 'ADD TO CART' button.

Grant Request

Grantee: ALF Food Pantry

Primary Contact: Mr. Tim Eckles

Address: 5411 El Camino Real
Atascadero, CA 93422

Purpose of Grant: ☐ unrestricted ☒ restricted to support...
Restricted to support summer supplemental food for school children
66/255 characters

Amount: 500

Anonymous: ☒ In this example, I checked anonymous to prevent my name and fund's name from being shared with the organization receiving the grant.

Recurring: ☐

☐ Check this box if you're an organization requesting a distribution

ADD TO CART

Step 6: Review and Submit Grant Requests.

- Click "Review Grant Requests."

The screenshot shows the 'Grant Request Cart' interface. At the top, there is a dropdown menu for the fund, currently set to 'Helen and Ronald Dunin Memorial Endowment Fund'. To the right are three buttons: 'GIVE TO MY FUND', 'CREATE GRANT REQUEST', and 'CART (1)'. Below the fund name, the title 'Grant Request Cart' is displayed, followed by a 'REVIEW GRANT REQUESTS' button. The main area contains a table with the following data:

Recipient	Description	Attachment	Amount
ALF Food Pantry Mr. Tim Eckles 5411 El Camino Real Atascadero, CA 93422	Restricted to support summer meals for school children		500.00
Grant Request Total			500.00

- If the grant request looks correct, click "Submit Grant Requests."

This screenshot shows the 'Grant Request Cart' interface with additional instructions. The table from the previous screenshot is present, but with an added 'Anonymous' column. Below the table, there is a red warning message and a list of steps to edit the request. At the bottom, a 'SUBMIT GRANT REQUESTS' button is highlighted.

Grantee	Description	Attachment	Amount	Anonymous
ALF Food Pantry Mr. Tim Eckles 5411 El Camino Real Atascadero, CA 93422	Restricted to support summer meals for school children		\$ 500.00	Yes
Total			\$ 500.00	

Please review the information above for accuracy.

To edit your request:

1. Click the Grant Status tab on the left
2. Click "Edit" on the right side of the grant
3. Modify your grant
4. Click "Update Cart"

SUBMIT GRANT REQUESTS

Tip! Please be on the lookout for a confirmation e-mail from The Community Foundation. If you need to contact us regarding your request, please reach out to donorservices@cfsloco.org or 805-543-2323.

Grant Request Status

- Click on the "Grant Status" tab to review your cart and submitted grant requests.



- View grant request status in the Status column.

Grants				
Request Date	Status	Recipient	Description	Amount
06/04/2026	Request	ALF Food Pantry		600.00 CANCEL
06/04/2026	Request	ALF Food Pantry		500.00 CANCEL
06/04/2026	Request	ALF Food Pantry		600.00 CANCEL
06/04/2026	Pending	ALF Food Pantry		500.00
03/17/2026	Complete	Helen & Ronald Dunin Legacy Scholarship Fund		15,000.00
10/16/2025	Approved	MICOP		14,679.00
10/16/2025	Complete	ALF Food Pantry		20,000.00
10/16/2025	Approved	The Gala Pride and Diversity Center		40,000.00
10/16/2025	Approved	Community Counseling Center of San Luis Obispo County		26,000.00

- Grant status definitions and timeline.

You can track your request status in the Fund Advisor Portal under the "Grant Status" tab. Total processing time is typically one week.

Status definitions:

- Request** – Submitted successfully.
- Pending** – Under review by CFSLOCO staff (reviewed weekly on Tuesdays).
- Approved** – Approved by CFSLOCO staff.
- Paid** – Check has been issued.
- Complete** – Check and grant letter have been mailed.

*Timelines may vary if the grantee is new to our system or requires additional due diligence.

Cancel a Submitted Grant Request.



Grant requests cannot be canceled once they pass the "Request" status stage.

- Click on the "Grant Status" tab to review your cart and submitted grant requests.



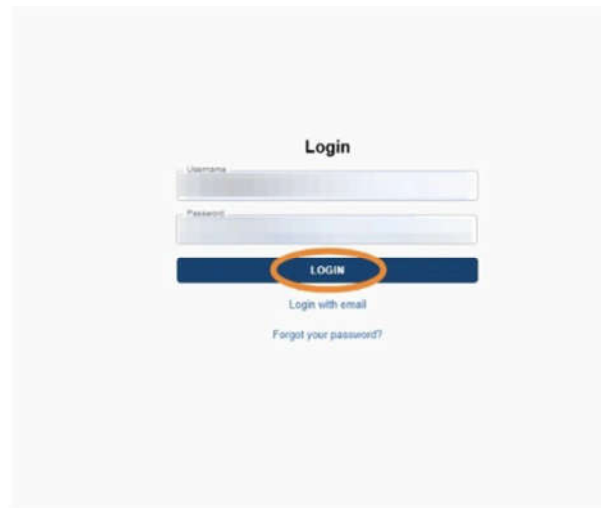
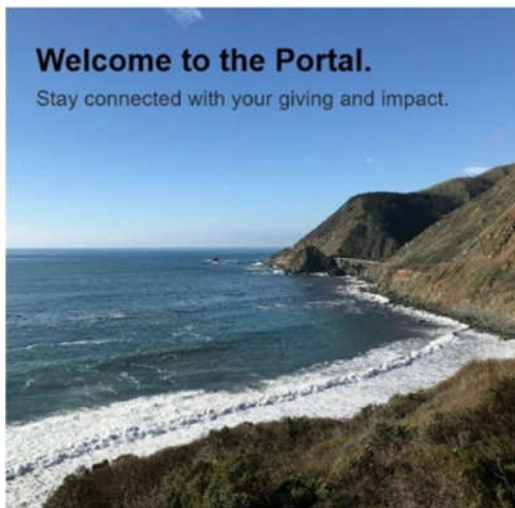
- Click "Cancel" to remove an unwanted grant request.

Grants				
Request Date	Status	Recipient	Description	Amount
06/04/2026	Request	ALF Food Pantry		600.00
06/04/2026	Request	ALF Food Pantry		500.00
06/04/2026	Request	ALF Food Pantry		600.00
06/04/2026	Pending	ALF Food Pantry		500.00
03/17/2026	Complete	Helen & Ronald Dunin Legacy Scholarship Fund		15,000.00
10/16/2025	Approved	MICOP		14,679.00
10/16/2025	Complete	ALF Food Pantry		20,000.00
10/16/2025	Approved	The Gala Pride and Diversity Center		40,000.00
10/16/2025	Approved	Community Counseling Center of San Luis Obispo County		26,000.00

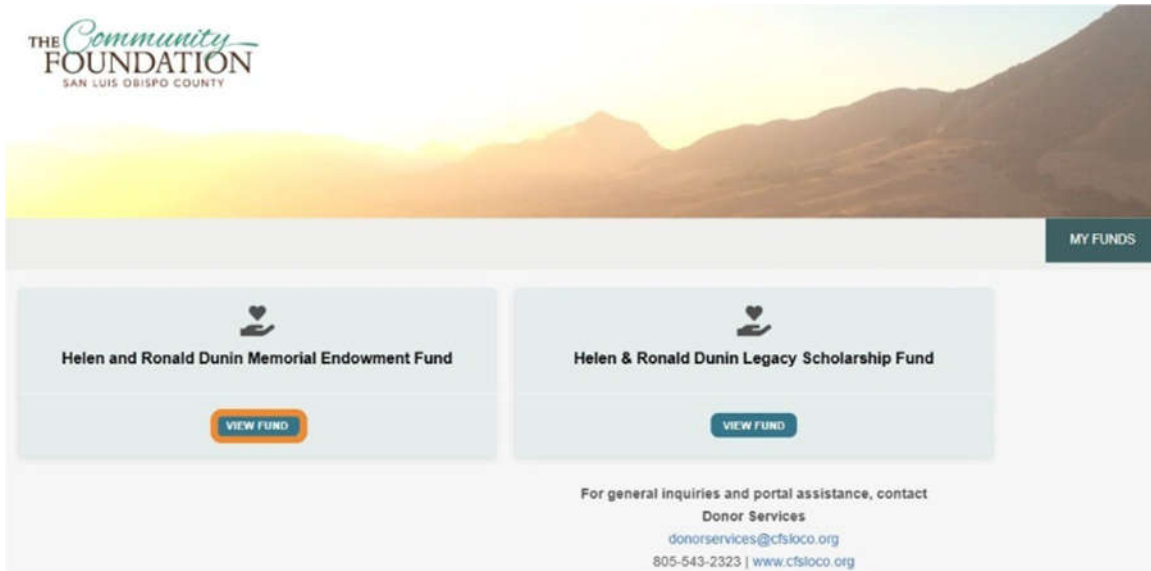
Where to View My Fund Statements, Investment Performance, and Additional Resources.

This guide helps you view your fund statement, investment portfolio, and additional resources in the Fundholder Portal. All materials will be in a printable PDF format.

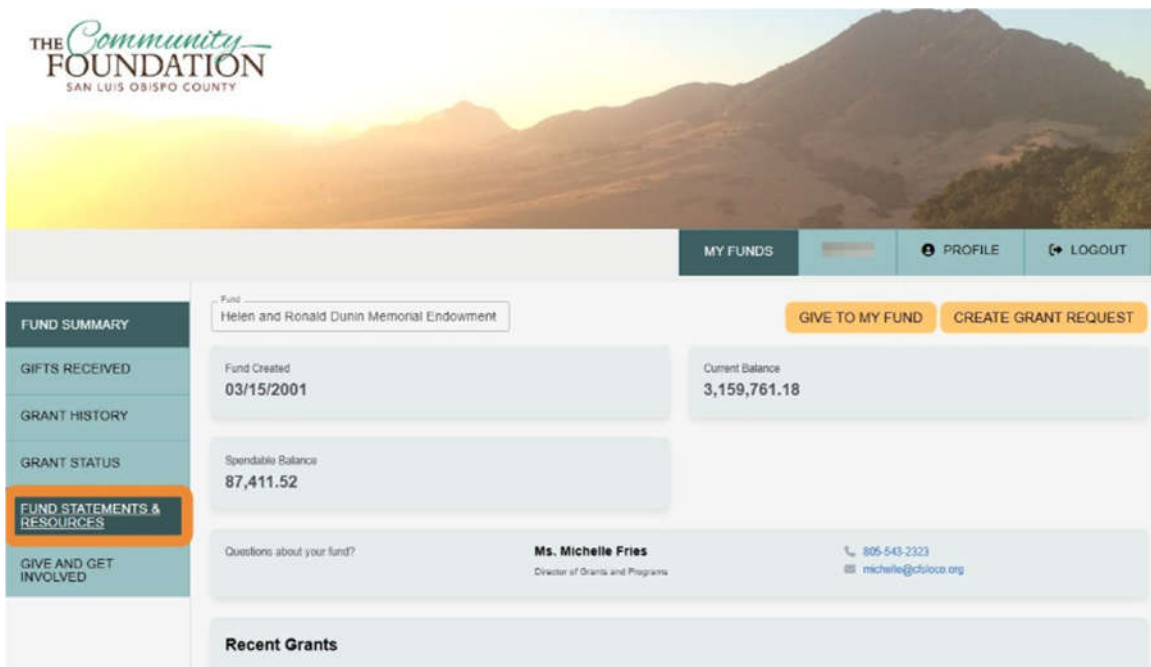
1. Navigate to the [Portal Login Page](#).
2. Enter your username and password. Then click "Login".



3. If you have multiple funds, select the desired fund by clicking "View Fund".



4. Click "Fund Statements & Resources" tab on the left-hand side.



View Fund Statements

- Under the upper "Fund Statements" tab, you will see all statements and their reporting dates.

FUND SUMMARY

GIFTS RECEIVED

GRANT HISTORY

GRANT STATUS

FUND STATEMENTS & RESOURCES

GIVE AND GET INVOLVED

Fund

Helen and Ronald Dunlin Memorial Endowment

GIVE TO MY FUND

CREATE GRANT REQUEST

FUND STATEMENTS

RESOURCES & INVESTMENT REPORTS

Click [View](#) next to the statement you'd like to see. All statements will be in pdf. format.

Statements

10 entries per page

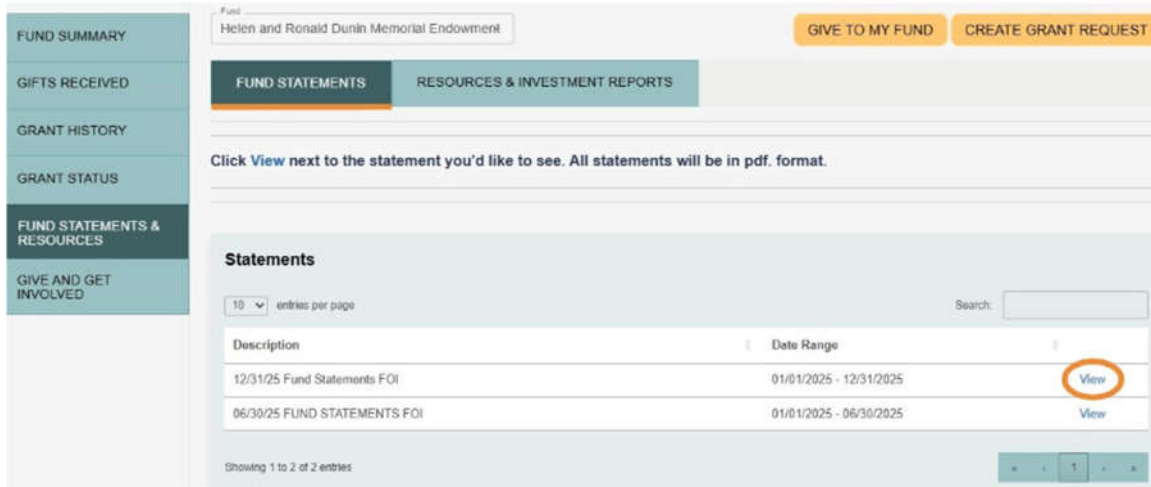
Search:

Description	Date Range	
12/31/25 Fund Statements FOI	01/01/2025 - 12/31/2025	View
06/30/25 FUND STATEMENTS FOI	01/01/2025 - 06/30/2025	View

Showing 1 to 2 of 2 entries

1

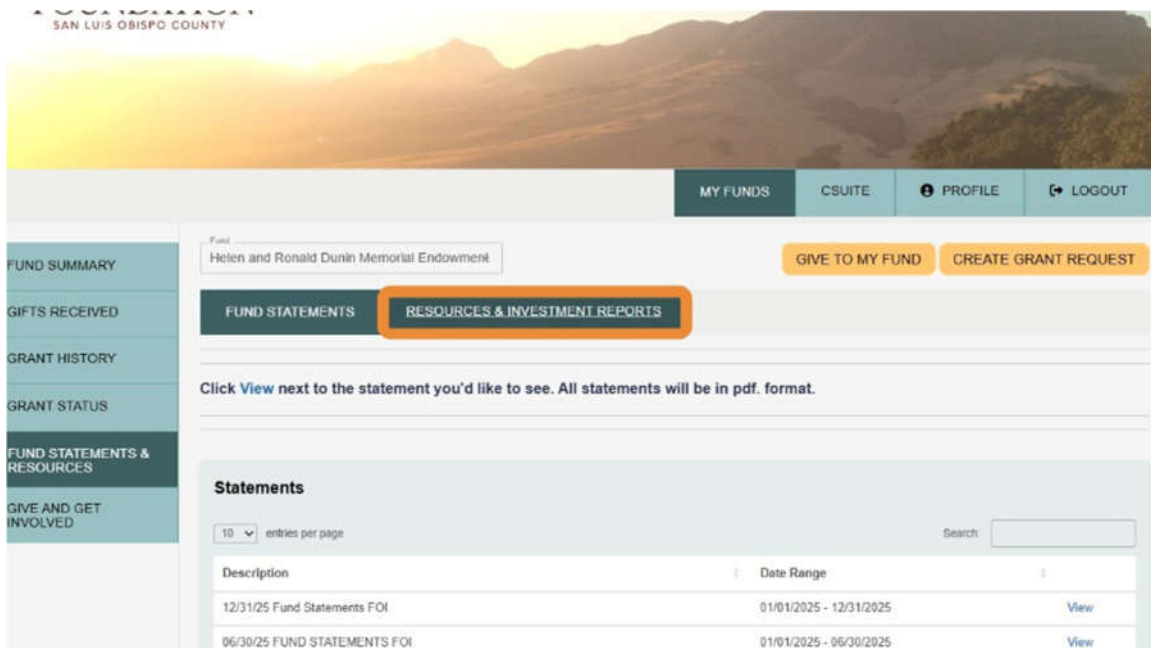
- To access your fund statement, click "view" on the right-hand side.



View Investment Performance and Additional Resources

Visit this section to access your Investment Portfolio, the *How to Create and Track Grant Requests* step-by-step guide (if applicable), the Fund Amendment form, and other helpful resources as they become available.

- Click "Resources & Investment Reports"



To open a document, click the file name.

Fund: Helen and Ronald Dunin Memorial Endowment Fund

GIVE TO MY FUND CREATE GRANT REQUEST

FUND STATEMENTS RESOURCES & INVESTMENT REPORTS

Files FILTER

10 entries per page Search

Date	Filename	Description
06/01/2026	Investment Performance Report- March 2026.pdf	
06/22/2026	How to Create and Track Grant Requests.pdf	



Monthly investment reports are only available for funds invested in our portfolios.

Fundholder Portal Frequently Asked Questions

I didn't receive an email to set up my account. What should I do?

First, check your spam or junk folder. If you still don't see the email, contact our team, and we'll send you an invitation.

I want to change my email linked to my fund. Who should I contact?

If you would like to change the email linked to your account, please contact our Donor Services team at donorservices@cfsloco.org

I forgot my password. How do I reset it?

Click 'Forgot Password' on the Fundholder Portal login page and follow the prompts. If you need additional assistance, we're happy to help.

How often are fund statements available?

Fund statements are uploaded quarterly. If your fund is invested, investment performance reports are uploaded monthly.

Where can I find my fund statements?

Login to the portal and select Fund Statements & Resources to view and download your available statements and other resources.

I advise more than one fund. Can I see them all?

Yes. If you are a fund advisor for multiple funds, all of your funds will be available under your account.

Can I add someone else to my fund's portal access?

Yes. If you would like to add or remove an authorized fund advisor, successor advisor, board member, financial advisor, or other authorized representative, please contact us. We'll help you complete a Fund Amendment Form to update your fund records and portal access.

Can I recommend a grant to an organization through the portal?

Yes. If you hold a fund with advisory privileges, you can submit grant recommendations directly through the portal. All recommendations are reviewed through the Foundation's standard due diligence process before grants are approved and distributed.

Can I see who donated to my fund?

Yes. The Gifts Received section displays contributions made to your fund, including donor names (unless the gift was made anonymously), gift dates, and amounts.

Can I donate directly to my fund from the portal?

Yes. You can make a secure online gift to your fund using a credit or debit card. To make gifts of stock, real estate, IRA Qualified Charitable Distributions (QCDs), or other non-cash assets, please contact our team.

Can my friends and family donate to my fund?

Yes. We can provide a secure online giving page that friends, family, and colleagues can use to contribute to your fund. Contact us to learn more.

Can I schedule one-on-one training?

Yes. We'd be happy to walk you through the portal and answer any questions. [Schedule](#) a training session with our Donor Services team.

We're Here to Help

Have a question about your fund or need help navigating the portal? Our team is here to help.

Email: donorservices@cfsloco.org

Phone: 805-543-2323