

MyFund Portal Overview for LVCF Fund Advisors



Connecting Donors Who Care with Causes that Matter



FAQ's About the Lehigh Valley's Online Portal for Fund Advisors

The Lehigh Valley Community Foundation's online portal was designed so that fund advisors have secure, 24/7 access to monitor their fund and recommend grants using an intuitive online platform. Our staff has worked diligently to ensure MyFund Portal's ease-of-use and functionality, but we know that any change can be challenging to navigate. As you explore the portal, we anticipate that you may still have questions and have tried to anticipate many of those in this document.

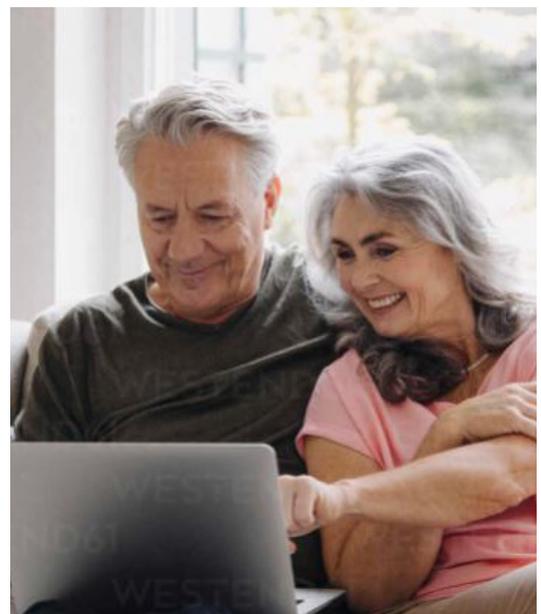


If you need further assistance don't hesitate to contact Carrie Krug Nedick, CAP®, Director of Donor Services by email: carrie@lvcfoundation.org

About the Lehigh Valley Community Foundation

At the Lehigh Valley Community Foundation, we connect donors who care with causes that matter. A leader in charitable giving in the Lehigh Valley for more than 58 years, we receive support from donors, manage funds to grow over time, and make \$10 million high-impact grants annually to strengthen local nonprofits.

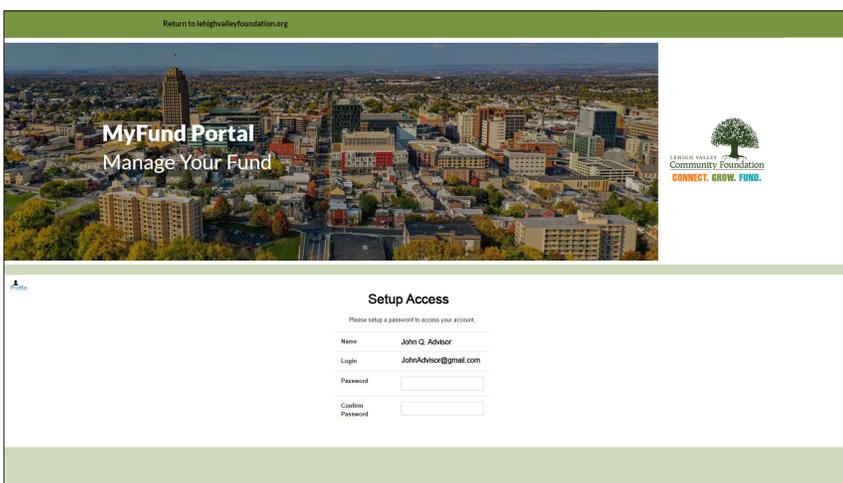
The Foundation manages more than 300 charitable funds, totaling over \$130 million, and we continue to grow—both in size and in the ways we fulfill our mission. We are evolving to engage more deeply with partners, serve more effectively as a thought leader on community issues, and explore more innovative ways to make life better across the Lehigh Valley.



MyFund Portal

Authorized contacts for funds of the Lehigh Valley Community Foundation will received an e-mail with instructions on how to create a custom password. If you are an authorized fund contact and did not receive that email, please check your spam or junk e-mail folder. Please delete this automated email once you have successfully completed this process. The link contained in the email should only be used once, for establishing your initial password.

How do I Log-in the First Time



Return to lehighvalleyfoundation.org

MyFund Portal
Manage Your Fund

LEHIGH VALLEY
Community Foundation
CONNECT. GROW. FUND.

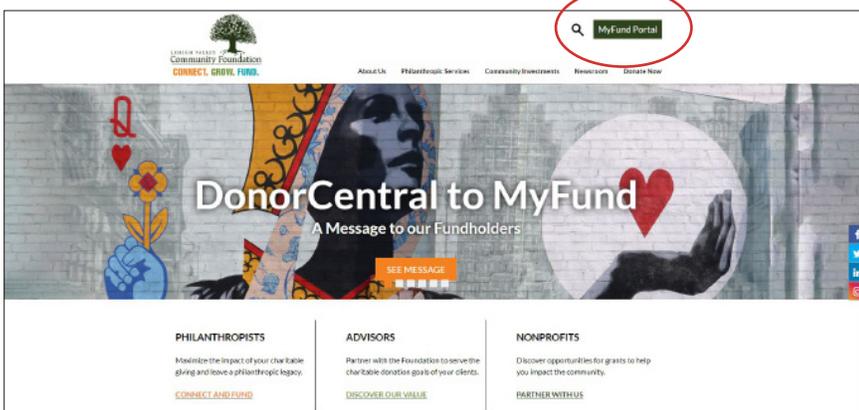
Setup Access
Please setup a password to access your account.

Name: John Q. Advisor
Login: JohnAdvisor@gmail.com
Password:
Confirm Password:

Establish Your Password

You will receive an email from sender no-reply@fcsuite.com, with “The Lehigh Valley Community Foundation” referenced in the email’s subject line. The email will provide a link to the portal where you will establish your login credentials. Follow the instructions to create a password for your account in the portal. Take note of your username (which is your email address) and password as you complete this process.

Where Can I Gain Easy Access to the MyFund Portal



Easy Access at www.lvcfoundation.org

Once you have followed the instructions in that email to set up your password, you can access the portal by visiting lvcfoundation.org and clicking MyFund portal button in the upper right hand corner of the page.

As you explore the portal, we anticipate that you may still have questions or need assistance, and we are here for you. To better serve you and to provide the latest information, we have developed this FAQ, which serves as a quick-reference guide and additional resources, which can be found below, to support your use of the MyFund portal.

Where do I find my fund balance?

The **Fund Summary** tab of the portal displays the current fund balance as well as the balance available to grant. You will also see the date the fund was established, total contributions to the fund and total grants made from the fund. If there is a difference between the spendable balance and the current fund balance, that is due to scheduled grant payments.

The screenshot shows the 'FUND SUMMARY' page for 'LVCF - Family Impact Fund'. A 'CREATE GRANT REQUEST' button is circled in red. The 'Current Balance' is also circled in red. Other metrics shown include Fund Created (12/31/2014), Available to Grant (37,054.38), Total Grants (75,180.00), and Total Contributions (111,148.98).

Metric	Value
Fund Created	12/31/2014
Current Balance	37,054.38
Available to Grant	37,054.38
Total Grants	75,180.00
Total Contributions	111,148.98

How do I make a grant?

After logging in to MyFund Portal, click on “Create Grant Request”

The screenshot shows the 'CREATE GRANT REQUEST' page. It provides instructions on how to recommend a grant, including selecting a grantee type. The buttons 'PREVIOUS GRANTEE OR FUND', 'SEARCH GRANTEE', and 'MANUAL GRANTEE' are circled in red.

To recommend a grant, first press the "Create Grant Request" button on the right side of this page.

Next you can do one of the following:

- 1) Choose a grantee that you have already given to by selecting "Previous Grantee" below
- 2) Search for a new grantee by selecting "Search Grantee" below
Enter Grantee name, location or EIN
If the grantee is not in our database, please check "Candid Results"
- 3) If none of the options above locate the grantee, select "Manual Grantee" below and enter details about the organization

Next, fill in the details about your grant request and click "Review"

Finally, click "Submit Request"

Grant Request > Choose Type

PREVIOUS GRANTEE OR FUND SEARCH GRANTEE MANUAL GRANTEE

How do I make a grant?

There are three ways you can start the grant recommendation process:

- Choose a previous grantee or fund at LVCF.
- **Search for other Grantees** by typing keywords that allow Candid, an information service specializing in reporting on U.S. nonprofit organizations, to search for organizations containing those keywords. The more keywords you provide, the better the search results.
- Enter grantee information manually.



MyFund Portal Overview for LVCF Fund Advisors

The screenshot shows the MyFund Portal interface for the LVCF - Family Impact Fund. The left sidebar contains navigation options: FUND SUMMARY, GIFTS, GRANTS (highlighted in red), GRANT RECOMMENDATIONS, RESOURCES & DOCUMENTS, and DONATE. The main content area has tabs for GRANT SUMMARY, GRANT HISTORY (highlighted in red), and RECURRING GRANTS. A 'CREATE GRANT REQUEST' button is in the top right. Below the tabs, there are 'FILTER' and 'EXPORT' buttons, a search box, and a '10 entries per page' dropdown. A table displays two grants:

ID	Date	Status	Grantee	Fund	Description	Advisor	Amount	
22433	12/15/2025	paid	Historic Bethlehem Museums and Sites	LVCF - Family Impact Fund	Grist Miller's House - Restoration of Antes Mill Wall	Mr. and Mrs. Fundholder	5,000.00	COPY
22087	11/19/2025	paid	Victory House of Lehigh Valley	LVCF - Family Impact Fund	Annual gift	Mr. and Mrs. Fundholder	1,000.00	COPY

From the Grants tab, you may also choose to copy a previous grant in the section entitled **Grant History**. Once you select the grantee the system will automatically move to a screen where you can add:

- a description to let the grantee know how the grant is to be used;
- the amount;
- whether you want the grant to remain anonymous;
- any additional notes you want LVCF staff to see before processing your grant request (these notes will NOT be passed along to the grantee)

If you want to make a recurring grant you will need to click on the section entitled **Recurring Grants**. You will need to add when you would like the first grant to be made; how often you would like this grant to be sent, and how many occurrences you would like to make.

By entering a number in the Number of Recurring box, the total of the indicated payments will be taken from your fund balance. By leaving the number of recurrances blank, only individual payments will be taken from your fund balance at the time of payment. For this option, payment will continue to distribute based on your specifications until you contact LVCF to cancel.

When will my grant be processed?

Grant payments are typically processed within 7-10 business days of your recommendation, although it may take longer when further due diligence is required for a grantee. When possible, payments are made via an efficient and secure ACH transfer directly to the grantee's bank account. If payment cannot be remitted via ACH, a check will be processed. Delivery of grants paid by check is dependent upon the postal service and a range of factors beyond our control. You will receive an email confirmation once the grant has been approved for payment, but you are always able to check the status of a grant via the portal or by emailing LVCF Grants Manager, **Holly Fitzpatrick**, holly@lvcfoundation.org.

How can I check the status of a grant?

The Grant Recommendations tab will show a list of grants requests along with their current status. Grant requests still in the “Request” stage can be canceled from this screen by clicking the Cancel button.

Fund: LVCF - Family Impact Fund CREATE GRANT REQUEST

To recommend a grant, first press the "Create Grant Request" button on the right side of this page.

Next you can do one of the following:

- 1) Choose a grantee that you have already given to by selecting "Previous Grantee" below
- 2) Search for a new grantee by selecting "Search Grantee" below
Enter Grantee name, location or EIN
If the grantee is not in our database, please check "Candid Results"
- 3) If none of the options above locate the grantee, select "Manual Grantee" below and enter details about the organization

Next, fill in the details about your grant request and click "Review"

Finally, click "Submit Request"

Request Date	Status	Recipient	Description	Amount
01/22/2026	Request	Allentown Symphony Association	General Operating	1,000.00 CANCEL
12/15/2025	Paid	Historic Bethlehem Museums	Grist Miller's House - Restoration of Antes Mill Wall	5,000.00

Once a grant recommendation has been paid, the grant will appear in the **Grants** tab, which is organized first by a Grant Summary of all grants paid to each organization, then an individual listing of all grants made from the fund over the past five years. **Please note:** the **Grant Date** shown is the date the grant request was submitted by the fund advisor and will not change as the status of the grant changes.

Fund: LVCF - Family Impact Fund CREATE GRANT REQUEST

GRANT SUMMARY GRANT HISTORY RECURRING GRANTS

GRANTS

GRANTS

▼ FILTER EXPORT

10 entries per page Search:

ID	Date	Status	Grantee	Fund	Description	Advisor	Amount
22433	12/15/2025	paid	Historic Bethlehem Museums and Sites	LVCF - Family Impact Fund	Grist Miller's House - Restoration of Antes Mill Wall	Mr. and Mrs. Fundholder	5,000.00 COPY
22087	11/19/2025	paid	Victory House of Lehigh Valley	LVCF - Family Impact Fund	Annual gift	Mr. and Mrs. Fundholder	1,000.00 COPY

Can I download a list of my grantees?

You may use the Export button to download all transactions from the Gifts tab or the Grants tabs. Doing so will generate and download a csv file or Excel file.

What if I forget my password?

On the login page, click “Forgot Password.” Enter the username of your account, which is the email address. The system will send you an email to reset your password.

Use the email that the Lehigh Valley Community Foundation has associated with your profile and click Reset Password. Check your email for password assistance.

For security reasons, LVCF staff will not be able to reset your password for you, but we can help you navigate the process if you need assistance, contact Carrie Krug Nedick, Director of Donors Services and alert her to any issue you may have with the portal.

How do I manage my contact information?

To change your contact information, or to add or remove advisors from the fund, please contact:

Carrie Krug Nedick, CAP®

Director of Donors Services

Lehigh Valley Community Foundation

carrie@lvcfoundation.org





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LEHIGH VALLEY
Community Foundation

CONNECT. GROW. FUND.