



The
**COMMUNITY
FOUNDATION**
of the New River Valley

ONLINE DONOR PORTAL OPT-IN FORM

Please complete this form (front and back) and review and sign the [Donor Portal Information and User Guidelines](#) to begin using the Online Donor Portal.

Special Note for Giving Circles, County-Based Funds, and Donor Groups: Please designate a single individual to use the donor portal on behalf of your fund and ask him/her to complete this form.

1. Fund Name

2. Donor Name

3. Who will be using the portal to view information about your fund? (Check One)

<input type="checkbox"/>	I will be using the donor portal.
<input type="checkbox"/>	I would like to designate someone to use the portal on my behalf. I understand that this person will have the ability to view all fund information and recommend grants. Designee Name: Relation: I, _____, authorize the designee above to use the online donor portal for my fund. Signature: _____ Date: _____

4. To be completed by the person using the online portal (you or your designee).

Name:		
Street Address:		
City:	State:	Zip:
Primary Phone #:	Secondary Phone #:	
Email Address: <i>This will be your User ID for the online portal</i>		

5. Would you like to continue receiving the Annual Fund Activity Report by mail each spring?

	Yes, please continue mailing the annual fund activity report.
	No, I will access this statement through the online portal only.

6. Confirmation Of Review and Agreement

(To be completed by the person using the online portal – you or your designee)

I, _____, have read and signed the Online Donor Portal Information and User Guidelines.

Signature: _____

Date: _____

Please return this form and a signed copy of the Online Donor Portal Information and User Guidelines to the CFNRV to initiate online access.

By Mail: PO Box 6009, Christiansburg, VA 24068-6009

By Email: cfnrv@cfnrv.org

Once staff has reviewed these forms, you will receive an email with a link to set up your online account and begin using the donor portal.

For staff use only	Initial	Date
Completed Opt-In Form Received		
Completed Information & User Guidelines Received		
Fund Advisor Set Up in Foundant		
Set-Up Email Sent to Donor/Designee from Foundant		