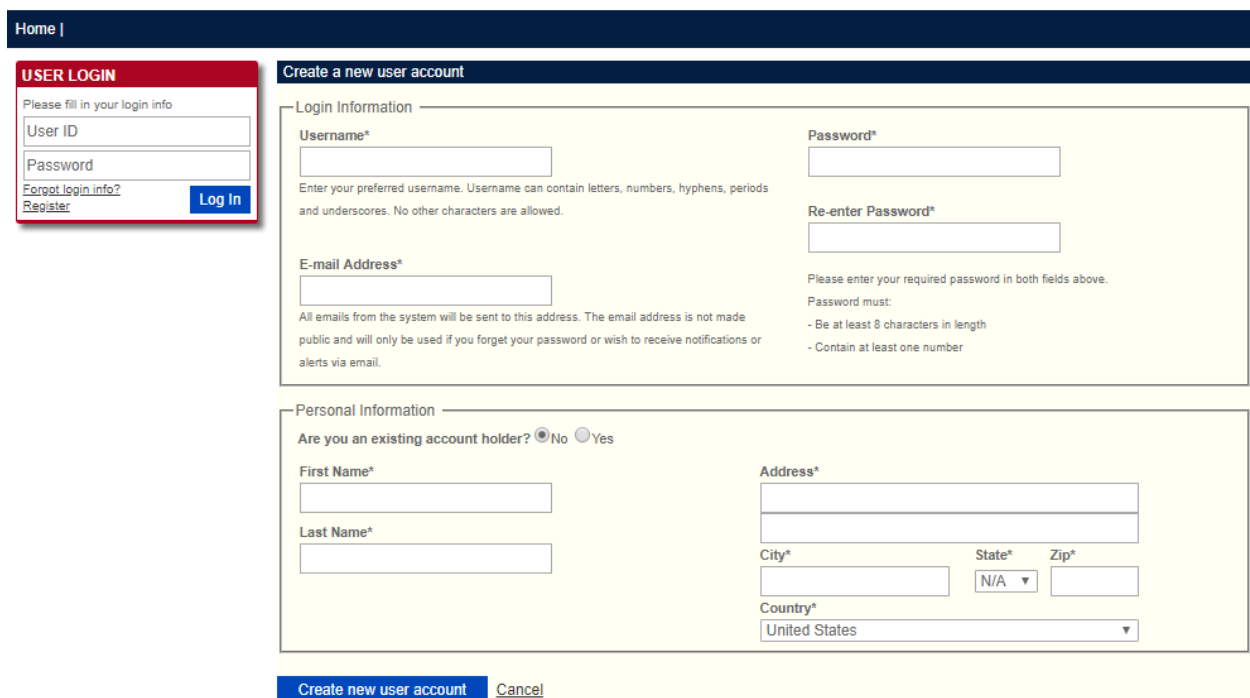


American Cancer Society: Open New Fund Online Guide

1. Creating Your Credentials

- ✓ Under User Login, select *Register*. Create a username and password and enter your email address. Refer to the directions underneath each field to identify invalid characters. Ensure your username is *available* and password is *valid*.
- ✓ Under Personal Information, when asked if you are an existing account holder, **click No**. Proceed to enter your first name, last name, and address.



Home |

USER LOGIN

Please fill in your login info

User ID

Password

[Forgot login info?](#) [Register](#) [Log In](#)

Create a new user account

Login Information

Username*

Enter your preferred username. Username can contain letters, numbers, hyphens, periods and underscores. No other characters are allowed.

Password*

Re-enter Password*

Please enter your required password in both fields above.

Password must:

- Be at least 8 characters in length
- Contain at least one number

E-mail Address*

All emails from the system will be sent to this address. The email address is not made public and will only be used if you forget your password or wish to receive notifications or alerts via email.

Personal Information

Are you an existing account holder? No Yes

First Name*

Last Name*

Address*

City* State* Zip*

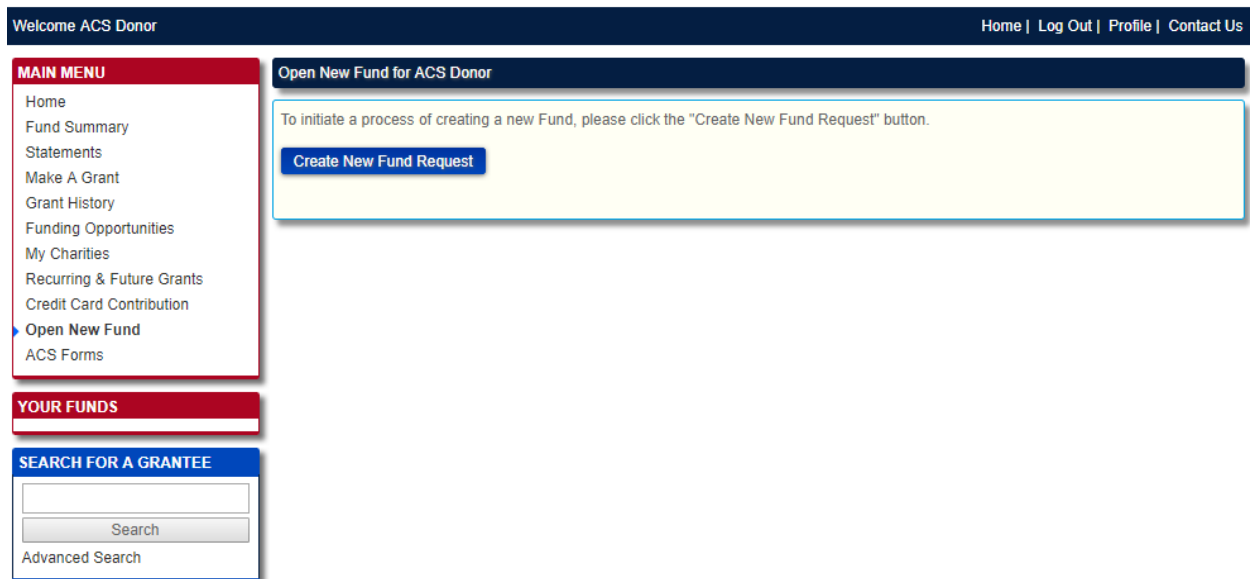
Country*

[Create new user account](#) [Cancel](#)

- ✓ Click the box titled **Create New User Account**, located at the bottom of the page.
- ✓ A pop-up box will appear, alerting you that your new user account has been created successfully. Click **OK** to continue to the home screen.

2. Open New Fund

- ✓ At the top left, under Main Menu, click **Open New Fund**. Then select the blue button titled: **Create New Fund Request**.



The screenshot shows the American Cancer Society donor portal interface. At the top, there is a dark blue header with the text "Welcome ACS Donor" on the left and "Home | Log Out | Profile | Contact Us" on the right. Below the header, there is a main navigation area. On the left, there is a "MAIN MENU" section with a red header, containing links for Home, Fund Summary, Statements, Make A Grant, Grant History, Funding Opportunities, My Charities, Recurring & Future Grants, Credit Card Contribution, **Open New Fund** (highlighted with a blue arrow), and ACS Forms. Below this is a "YOUR FUNDS" section with a red header. At the bottom left is a "SEARCH FOR A GRANTEE" section with a search input field, a "Search" button, and a link to "Advanced Search". The main content area has a dark blue header that says "Open New Fund for ACS Donor". Below this header, there is a yellow box with the text "To initiate a process of creating a new Fund, please click the 'Create New Fund Request' button." and a blue button labeled "Create New Fund Request".

- ✓ Complete each tab of the electronic Donor Contribution Agreement form and click *Save & Continue*. Or click *Save*, to return to the form under **Open New Fund** later.
- ✓ To add additional DAF participants, click on *Add a [Donor, Advisor]* button under the Interested Parties tab. Once the information is entered, click *Save & Continue*.
- ✓ When you reach the Investment Options tab, if you would like to invest in multiple allocation pools, please select "100% Money Market" and contact the American Cancer Society at (804) 527-3784 or brent.chambers@cancer.org. Please provide your full name and your request regarding establishing a donor advised fund online.
- ✓ When you reach the Documents tab, please note that no documents are required for upload, but you will be required to check the box "I wish not to upload documents at this time" and click *Save & Continue*.
- ✓ Review your application on the Finalize Tab. Verify that you have read the Donor Circular & Disclosure Statement and check the box agreeing to the Terms and Conditions. **Sign agreement electronically.**
- ✓ Click on the box titled **Submit Application**. A confirmation will appear at the bottom of the page: "This application has been submitted." You may then return to the **Open New Fund** tab at any time to view the status of your submission.



3. Fund Your American Cancer Society Donor Advised Fund

- ✓ Once the American Cancer Society staff and Drinker Biddle and Reath, LLC teams review your application, a donor advised fund will be created in your portal.
- ✓ You will receive a confirmation email with your new account number and transfer instructions to complete the initial funding.

We look forward to working with you to fulfill your philanthropic goals through your American Cancer Society Donor Advised Fund. Please contact us with any questions by email at brent.chambers@cancer.org or call (804) 527-3784.