

UNITED WAY OF GREATER ROCHESTER DONOR ADVISED FUND ONLINE SYSTEM INFORMATION

Thank you for your support of United Way of Greater Rochester through a Donor Advised Fund. It is our goal to provide a simple, effective way to meet your philanthropic goals.

When you first open a Donor Advised Fund with United Way, you will receive an email with a user name and password to set up your account in our simple online system.

THE ONLINE SYSTEM WILL ALLOW YOU TO:

- View the most current statement detailing recent transactions and balance information.
- Make grant requests to any organization(s) that qualify as a public domestic charity under the Internal Revenue Code, from your donor advised fund.
- View prior grant history.

To gain access to your Donor Advised Fund online, reset a username or password, or receive statements by email, contact Julie Bowen at Julia.Bowen@uwrochester.org or (585) 242-6526 or Brian Fitzgerald at Brian.Fitzgerald@uwrochester.org or (585) 242-6522.

Thank you for building a stronger, greater Rochester with United Way.

INVEST. CONNECT. SERVE.



United Way of Greater Rochester • 75 College Avenue • Rochester, NY 14607-1009

