

# My online philanthropic account

As a Vanguard Charitable donor, you have access to your philanthropic account online, where you can manage all areas of your giving. Make contributions, recommend grants, select investments, and more from any internet connected device—all on a secure, easy-to-navigate platform.



## Account summary

The *Account summary* page is your home screen and hub for all giving activities. From here, reach many resources, including:

- Account balance
- Current asset allocation
- All recent activity
  - 💡 Use the *Recent activity* table to get quick access to account activity conducted within the past 90 days. Want more information? Dive deeper by clicking **View all**.
- Grant recommendations
- Contributions
- Account reports and statements
- Fees and expenses



## Reports

Use the *Reports* page to view a wide range of account information:

- Transaction history
- Quarterly account statements
- Tax substantiation letters
- Grant payment letters
- Contribution confirmations
- Historical account balances
- Investment options and performance



## Grants

Use the *Grants* page to manage your grant recommendations:

- Research and recommend a one-time or recurring grant.
- Find your favorite charities using a built-in search bar.
  - Use the *My saved charities* list to store your favorite organizations in one easy-to-access location, and recommend grants to them with the click of a button.
- Review the status of pending, completed, and cancelled grant recommendations.



## Contributions

Use the *Contributions* page to manage all contributions into your account:

- Initiate charitable contributions in 5 steps.
  - A step-by-step guide details the paperwork and signature required to donate a range of asset types.
- Review the status of contributions.
- Collect specific donation details for tax reporting purposes.

### YOUR GIVING, YOUR TIME

Activities completed using paper forms add at least one business day to the processing timeframe. Giving online saves you time and resources—providing charities with support more quickly.

### TRACK YOUR GIVING

On both the *Grants* and *Contributions* pages, you can export your giving data to an Excel spreadsheet—allowing you to closely monitor your charitable giving.

### GIVING GREEN

Support the environment while supporting your favorite charities. Reduce your carbon footprint—preserving trees and other natural resources—by giving online.

To register for online account access, visit [vanguardcharitable.org](http://vanguardcharitable.org) and click **My account** on the right side of the screen.