

# Manage your account online

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



## Account summary

The *Account summary* page is your home screen and hub for all giving activities. From here, you can reach the following:

- Account balances.
- Current investment allocation.
- Recent transactions.



Use the *Recent transactions* table to get quick access to account activity conducted within the past 90 days. Want a longer time frame? Dive deeper by clicking *View all*.

- Recommend a grant.
- Contribute to my account.
- Recommend an exchange.
- Your profile.
- Fees and expenses.



## Contributions

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

- Initiate charitable contributions in 5 steps.



A step-by-step guide will prompt you to provide the information required to donate a range of asset types.

- Review *Contribution activity* to find the status of your contributions.
- Collect specific donation details for pending, completed, and cancelled contributions.



## Grants

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

- Recommend a one-time or recurring grant.
- Find a charity with GuideStar's National Nonprofit Directory.
  -  The Nonprofit Directory is a powerful research tool available to you free of charge.
  - Use the *My saved charities* feature to store your favorite organizations for future grants.
- Review *Grant activity* to track the status of pending, completed, and cancelled grants.



## Reports

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

- Confirmations and Substantiations (by year):
  - Tax substantiation letters.
  - Grant payment letters.
  - Contribution (*Additional gift*) confirmations.
- Statements (by year).
  -  Find quarterly statements with an overview of account balances, investment allocations, and activity, including contributions and grants.
- Transaction summary.
- Find additional reports on investments and performance under the *Investments* tab.

### 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 *Contributions* and *Grants* 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.