



Contribute Assets User Guide:

Starting in October 2022, we will be using the “Contribute Assets” function in Donor View to better organize your contributions to your account and allow for the capability of seeing a backup copy of your contribution as well once it has been processed. The following guide will walk you through how to complete this new process:

Step One:

Log into Donor View; once logged in the “Contribute Assets to Your Account” button to click on will be under the gray brick called “Total Deposits” for you to click on:

The screenshot shows the Account Holder Dashboard for the United Methodist Stewardship Foundation of Greater New Jersey. The top navigation bar includes the logo, 'LOGOUT', and 'HOME' buttons. Below the navigation bar are three red buttons: 'Account Holders', 'Client View', and 'Contact Us'. The main content area is divided into several sections:


- Account Holder Dashboard** (left sidebar):
 - Account Activity
 - Deposit Activity
 - Request a Withdrawal/Distribution
 - Withdrawal/Distribution Activity
 - Account Relationships
 - My Profile
 - Forms & Documents
- Account Holder Dashboard** (main content):
 - Account: [Account Name] (Fund ID 12345)
 - Account Balance: \$1,234.56 (available) / \$5,678.90 (market value)
 - Statements: Open Last Statement (In Acrobat) | See All Account Activity and Statements
 - Go Green: Check here – if you would like to be notified by email when your Statement is available online. You are currently set up to receive an email when your Statement is available online.
 - Total Deposits: Recent Deposits | No deposits have been made to this account in the past 90 days. **CONTRIBUTE ASSETS TO YOUR ACCOUNT** (highlighted with a blue circle)
 - Need Help? For information and instructions, download the DonorView Guide. **DONORVIEW GUIDE** (button)

The next step will be regarding the next screen that appears where you will enter some information about your contribution.



Step Two:

When this button is clicked, the next screen with the information regarding your contribution will appear. The first two sections will be the account to receive the funds and the contributor (where the funds are coming from) these are defaulted to be originating from your organization. You will only need to click into the “Additional Contributor” section if this is directly from an external source.

LOGOUT HOME
Account Holders Client View Contact Us

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Contribute Assets

Use the form below to contribute cash to your account.

Note: This online form does not constitute a completed contribution and must be followed by a transfer of assets.

Please be prepared to provide pertinent details related to the assets, such as the church organization contributing the assets, the authorized signatory, or the name of the institution where the assets are currently held.

Required fields are in **bold**.

After completing the form, please sign the document and follow the provided instructions to initiate the transfer of assets to the Foundation.

Section 1 – Account

Account Name **Centenary Fund**

Section 2 – Contributor Information (Primary Contributor)

Primary Contributor (F... (Pastor/Primary Adviser)

First Name *****
Last Name **ZL**
Year of Birth
Address **2**
City *****
State **NJ**
Zip **07030**
Email **r**

Additional Contributor

Section 3 – Contribution Asset Information

Please note that submitting this Contribution Agreement does not initiate the transfer of assets. After submitting the form, please contact Stuart Goodwin at sgoodwin@gnjunc.org or 732-359-1058 if you have questions.

Once this part of the process is complete; the next step in the process will be to add information regarding the pending transaction your organization intends to deposit.



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Step Three:

After you have established whom is contributing to your account; you'll enter the data on the form. This will include the gift type (there are three types you can choose that you feel fit best; the first would be if the contribution is directly from your organization, the second is if it is from another DAF and the third is if the contribution is coming from an outside organization that is not a client with UMF.) All gift types will require the amount, payment type (ACH or Check), the reference number if available, and either the account name or the institution of where the gift is originating. Our ACH instructions are listed in this form if that option is chosen.

Additional Contributor

Section 3 - Contribution Asset Information

Please note that submitting this Contribution Agreement does not initiate the transfer of assets. After submitting the form, please contact Stuart Goodwin at sgoodwin@gnjumc.org or 732-359-1058 if you have questions.

Cash Contribution Asset Information

Gift Type

Amount

Payment Type EFT/ACH
 Check

EFT/ACH Number
If unknown, enter TBD

Financial Institution Name

Account Number at Transferring Institution

EFT/ACH Transfer Instructions:

ABA/Routing: 031201360
Bank Name: TD Bank
Bank Address: 2200 Route 66 Neptune, NJ 07753
Account Number: 4308751513

Section 4 - Acknowledgement of Terms

I agree to provide all documentation required to complete the transfer of assets in connection with my contribution.

I certify that, to the best of my knowledge, all of the information supplied via this form is accurate and I will notify The United Methodist Stewardship Foundation of Greater New Jersey in writing of any changes.

I accept the terms and conditions

Signature Type Paper
A PDF will be available for download upon submitting the form.

SUBMIT FORM



Once this data has been entered, check the box accepting the terms and conditions and click submit. There will be an email confirmation sent to the email address on file.



Step Four:

Once you have completed the form, you will receive an email with a PDF to download and sign. You can either mail it to the address below or preferably email it to me at sgoodwin@gnjumc.org and I will include it with your check copy once processed.

To: lucy@stellartechsol.com
CC:
Date: 04/19/2022 12:21:20
Subject: Contribution to account Test Church Account

You have been named as the Authorized Signatory for a contribution to account Test Church Account, Account ID: 16525.

Contribution Id:

17966

Please follow the link below to download, print, and sign the contribution agreement.
[Print and sign PDF.](#)

Please mail the signed contribution agreement form to:
 The United Methodist Foundation of Greater New Jersey
 205 Jumping Brook Road
 Neptune, NJ 07753

If you have questions, please contact Stuart Goodwin: sgoodwin@gnjumc.org / 732-359-1058

After processing is completed, you can find your check copies and other forms in the “Forms & Documents” section under “Account Documents”

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Forms & Documents

Account (Fund ID:

Forms & Documents

Title	Description	Download
DonorView Guide	Provides detailed instructions for using DonorView, including: Login, accessing account activity summaries and statements, requesting and authorizing a withdrawal/distribution.	Download
Authorized Signers Form	Word Document	Download
Frequently Asked Investment Questions	Word Document	Download
UMF Withdrawal Instructions	Word Document	Download
New Account Enrollment Form	Word Document	Download
Fund Transfer Authorization	Word Document	Download

Account Documents

NAME	DATE	SIZE
Cpdf	9/22/2022	36600
Cpdf	9/22/2022	36792