

OPERATIONS

FUND ADVISOR TOOLKIT

Northwest Minnesota Foundation



How to set up a recurring donation to a fund

Northwest Minnesota Foundation has the ability to accept recurring gifts to any of its component funds through automatic credit card or ACH transactions. This is a great option to offer to donors of your fund to regularly support your worthy cause.

Here are the instructions on how to do so:

1. Visit the website www.nwmf.org
2. Find the “GIVE NOW” section at the top of the webpage (highlighted in yellow)

The screenshot shows the Northwest Minnesota Foundation website. At the top, there is a navigation bar with links for Fund Advisors, Donor Advised Funds, Professional Advisors, Grants, Scholarships, and NMF Web Portal. A search bar is also present. Below the navigation bar is a main menu with links for HOME, WHO WE ARE, WAYS TO GIVE, PROGRAMS, LOANS, RESOURCES, NEWS, CONTACT US, and a yellow 'GIVE NOW' button. The background of the main content area features a green and blue topographic map pattern. The text 'Funds By County' is displayed prominently in the center of this area.

3. Choose the amount of your recurring donation. You may choose one of the amounts listed or use the “OTHER” box to indicate a different amount.

The screenshot shows a donation form. At the top, there are buttons for 'Share on Facebook' and 'Share on Twitter'. Below that, a question asks 'What type of donation are making?' with radio buttons for 'Donation' (selected), 'Pledge', and 'Event or Workshop'. The next section is 'Donation Amount' with a list of options: '\$250' (selected), '\$100', '\$50', '\$25', '\$10', and a 'Other' input field with a '\$' symbol.

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4. Choose from the drop-down menu to indicate the fund to which you would like your donation directed.
5. Choose how often you'd like your donation to be made:

How often do you want to make this donation?

Starting

12/11/2020

Ending



Enter a start and end date (you will get notified when your end date is approaching for reissuing your gift. You will also get an e-mailed receipt for each recurring donation made).

6. Enter your personal contact information (Name, Address, Email, Phone, etc.)
7. Enter your payment information (NOTE: You can have recurring credit or debit card charged for your donation or you may choose the eCheck option to have it come directly out of your checking account. You will need a routing number and bank account number to set this up)

For credit cards:

Payment Information

Billing Information Same as my personal information



Card Number REQUIRED

Expiration REQUIRED

12 - December

2020

CVV REQUIRED

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For ACH Transfer:

Payment Information

Billing Information Same as my personal information



Routing Number REQUIRED

Bank Account Number REQUIRED

8. Click "MAKE DONATION" to complete your transaction.

THANK YOU!

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