

PORTAL NAVIGATION GUIDE

PHILANTHROPY AT YOUR FINGERTIPS. ANY TIME. ANY PLACE.

ACCOUNT STAKEHOLDERS

Here you can list – and provide access permissions – to others if you choose. This could be family or advisers.

ACCOUNT STAKEHOLDERS

The Account Stakeholders page displays all individuals who have been provided access to any or all of the accounts you have. The level of access and role in the account can be adjusted by the account owner.

Levels of access can range from none, through to read only and full access.

Access can also be provided to trusted legal or financial advisers so information around your philanthropic giving, transactions and intentions can be shared.

GOOD TO KNOW

Account Stakeholders are sometimes referred to as 'interested parties'.

