

PORTAL NAVIGATION GUIDE

PHILANTHROPY AT YOUR FINGERTIPS. ANY TIME. ANY PLACE.

STATEMENTS AND PERFORMANCE

This page is where you can access reports on the performance of your account and access statements whenever you need them.



STATEMENTS

You can view your statements for your account and download PDF statements if you want to.

SEARCH, ACTIVITY AND DETAILS

The information held in these three sections are connected and enable you different ways to search a specified period.

i GOOD TO KNOW

When you choose the method you want to search using the dropdown options, both the Fund Activity Summary and the Account Activity Details tables will refresh with data from the data range.

In the Account Activity Summary, the starting balance shows what your account balance was at the start of the period you have chosen – and the balance at the end of the selected period will also be displayed.

All activity that occurred during the period will also be shown.

FUND INVESTMENT PERFORMANCE REPORTS

The Investment performance of the Equity Trustees Charitable Foundation will be reported on a quarterly basis. Those reports will be available here.