



Georgia Baptist Foundation

Dear Ministry Client:

This letter provides you with information on our internet access program known as Ministry ClientView. Ministry ClientView provides the opportunity to access trust account statements and other account information through the Foundation's website. Electronic delivery of statements will REPLACE mailed paper statements.

Consider this letter's information to decide if Ministry ClientView is right for you. **Return a signed copy of this letter and the enclosed application when you are ready to use Ministry ClientView.**

6405 Sugarloaf Pkwy
Duluth, GA 3097

(770) 452-8338
contactus@gbfoundation

When we receive a completed application, we will confirm your user ID and temporary password. Your user ID is the email address associated with your account. After resetting your temporary password, if you ever forget your password, you can reset it online. Click Forgot Password for an automatic reset. Multiple unsuccessful attempts to login will result in your user ID being locked. If that happens, please contact our office.

Account information available through Ministry ClientView is for inquiry purposes only. Information cannot be altered onscreen. No account activity (including withdrawals, wires and transfers) can be initiated through Ministry ClientView. Data can be exported to the user's file for spreadsheet applications or saving as a .pdf document.

Please be aware that the first 10 business days of the month are needed to summarize and report activity through the prior month-end.

You may have more questions after reading these materials, so we look forward to responding to your calls or emails. Contacts for Ministry ClientView are:

Candace Cannon at (770) 216-7538 or ccannon@gbfoundation.org
Scott Mitchell at (770) 216-7543 or smitchell@gbfoundation.org

You also have a toll-free number available to you, and that number is 1.800.452.9064, with extension 538 for Candace or 543 for Scott.

Faithfully yours,

Signature of Representative

Georgia Baptist Foundation

Georgia Baptist Foundation Ministry ClientView Application

Ministry ClientView users receive their statements through their Internet access ONLY.

Organization Name: _____

Address line 1: _____

Address line 2: _____

City, State, Zip: _____

Organization's telephone number: _____

Trust number _____ Trust name _____ (GBF Use Only)

Organization reporting year-end: Month _____ Day _____

AUTHORIZED USER: You are responsible for safeguarding your user ID and password.

Print name & title: _____

Signature: _____ Telephone: _____

Email address for statement notification: _____

IMPORTANT! Form must be signed by two representatives of the organization.

Print name & title: _____

Signature: _____ Date: _____

Print name & title: _____

Signature: _____ Date: _____



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Ministry ClientView User Guide

When you first login, you will be directed to the Dashboard. You will find a menu in the upper left corner of this and every page that will allow you to navigate quickly around the portal. Throughout the site, gold text indicates a link that will enable you to navigate through the site or drill down to get more detailed information. If you are responsible for more than one account and wish to view consolidated reports, click on ManagerView in the upper right corner of the page to navigate directly to consolidated reporting. Click AccountView to return to single account view.

What can I do and see on the Dashboard page?

- Click the folder icon in the Account section to select a different account.
- View the balance of the selected account.
 - Spendable – For accounts with routine distributions, this is the amount available for distribution.
 - Available – For accounts with no routine distribution, this is equal to the total market value. This amount is not necessarily available for withdrawal.
 - Market Value – Total of investment and cash.
- Directly open the most recent statement for the selected account.
- Navigate to the Activity and Holdings page.
- Link to support email.
- View recent additions to and distributions from the selected account.

What can I see and do on the Activity and Holdings page?

- This will be the page you will use most frequently.
- Click the folder icon in the Account section to select a different account.
- Download statements.
- View a summary of activity over a specified period.
- Drill down to see details of account summary items.
- Export account details to PDF or Excel.

What can I see and do on the Additions and Distributions pages?

- View and search account additions and distributions over a specified period.
- View the status of transactions that have been entered into our accounting system.

What can I see on the Account Authorizations page?

- View a list of persons who are related to your account(s).

What can I see and do on the My Profile page?

- View details of your current user profile.
- Update your mailing address by clicking the Addresses tab.
- Update your other contact information by clicking the Communications tab.
- Change your password and add or change your challenge questions.

What resources are available through Forms and Documents?

- Download the Account Authorization Form to update the list of persons with whom we may discuss your account(s).
- Download the Direct Deposit Authorization form to update the bank account to which we deposit income distributions from your account(s).
- Download the policy documents that are attached to each new account agreement:
 - Account document disclosures
 - Investment policy
 - Spending policy

What can I do through ManagerView?

- ManagerView is similar to AccountView except that it enables you to view consolidated information if you have more than one account.
- As in AccountView, you can click on gold text to view more details.
- Export details to a PDF or Excel.