How to View Your Fund Relationships

1. Log into DonorView.

2. Select DonorView in the navigation bar at the top of the screen.


4. The Fund Relationships table will display Name, Role and Access Level of all the users connected to your fund(s).
Our new system requires a Primary Advisor for each fund. It is purely a system requirement. The Primary Advisor role does not reflect how individuals associated with the fund are valued and does not affect access to the fund. The Joint Advisor role is assigned to the spouse or partner of the Primary Advisor. The role of Advisor is assigned to anyone else listed as an advisor in fund agreements.

*Please note only fundholders with Full Access level permissions can recommend grants, recommend changes to their investment portfolio and make online contributions to their fund(s).