

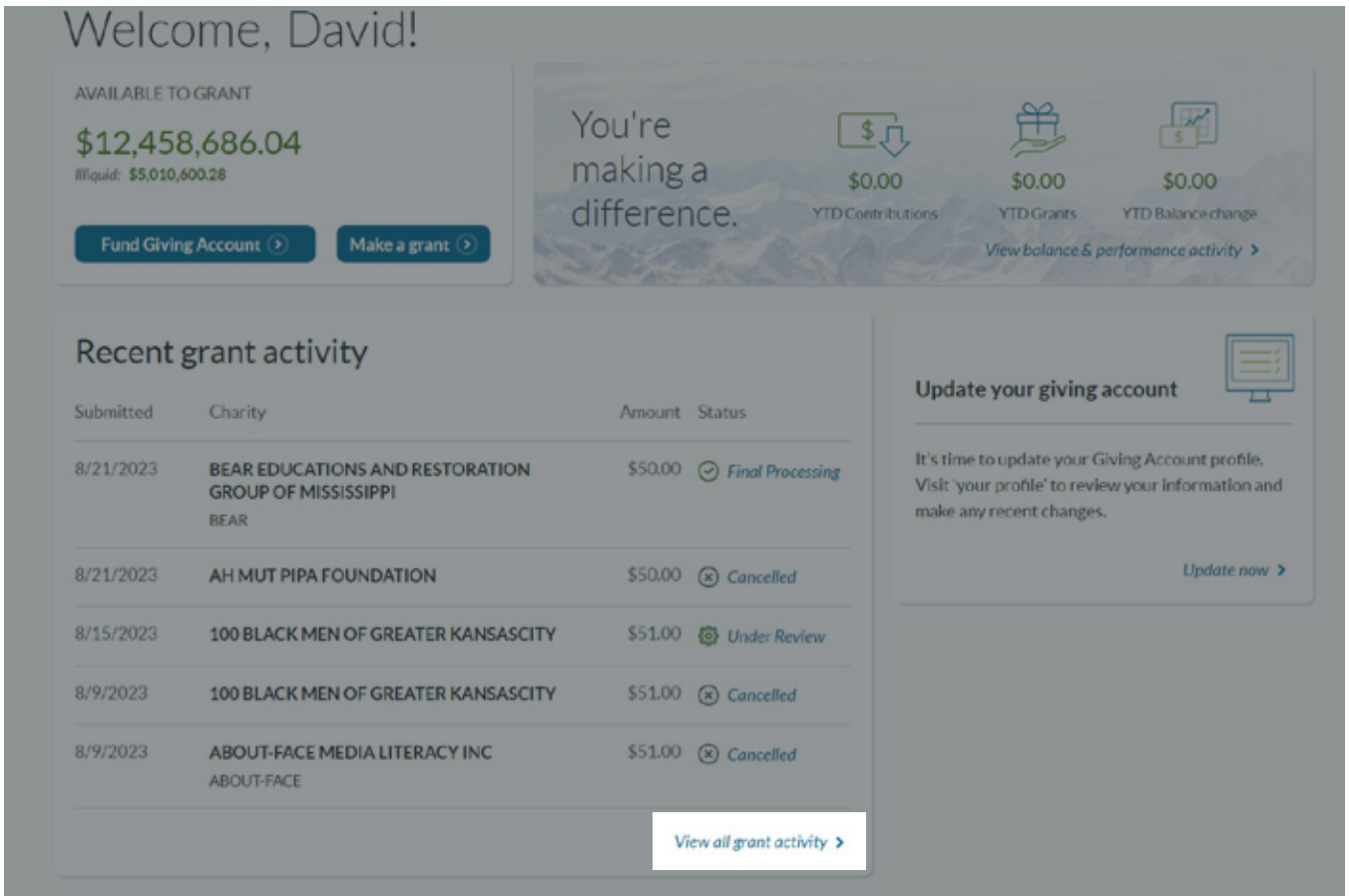
HOW-TO

Cancel or Edit a Grant Recommendation

Recently submitted, one-time grant recommendations may be eligible for cancellation. Similarly, if you need to edit a one-time grant, you will need to cancel and resubmit a new grant recommendation.

Here's how to cancel a grant recommendation:

1. Log in to your [Giving Account](#)®.
2. Click "View all grant activity" on your Recent grant activity dashboard.



Welcome, David!

AVAILABLE TO GRANT
\$12,458,686.04
If liquid: \$5,010,600.28






[Fund Giving Account](#) [Make a grant](#)

You're making a difference.

\$0.00 YTD Contributions
\$0.00 YTD Grants
\$0.00 YTD Balance change

[View balance & performance activity](#)

Recent grant activity

Submitted	Charity	Amount	Status
8/21/2023	BEAR EDUCATIONS AND RESTORATION GROUP OF MISSISSIPPI BEAR	\$50.00	 Final Processing
8/21/2023	AH MUT PIPA FOUNDATION	\$50.00	 Cancelled
8/15/2023	100 BLACK MEN OF GREATER KANSASCITY	\$51.00	 Under Review
8/9/2023	100 BLACK MEN OF GREATER KANSASCITY	\$51.00	 Cancelled
8/9/2023	ABOUT-FACE MEDIA LITERACY INC ABOUT-FACE	\$51.00	 Cancelled

[View all grant activity](#)

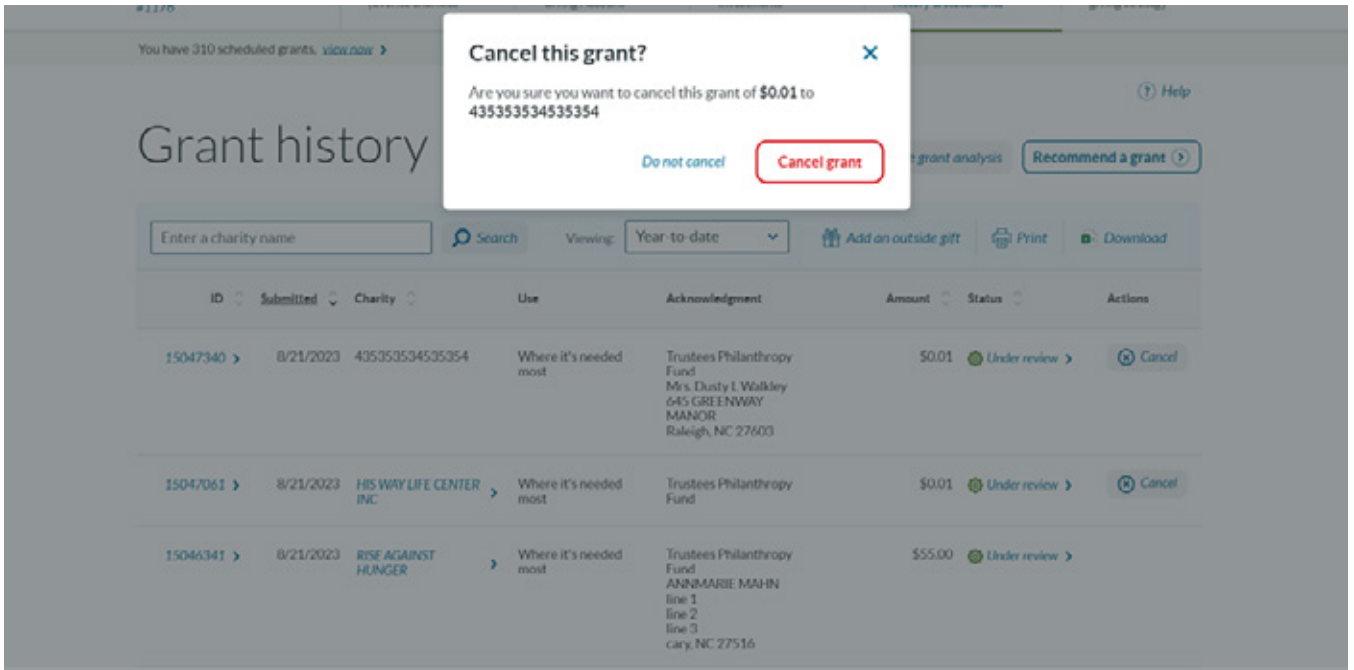
Update your giving account

It's time to update your Giving Account profile. Visit 'your profile' to review your information and make any recent changes.

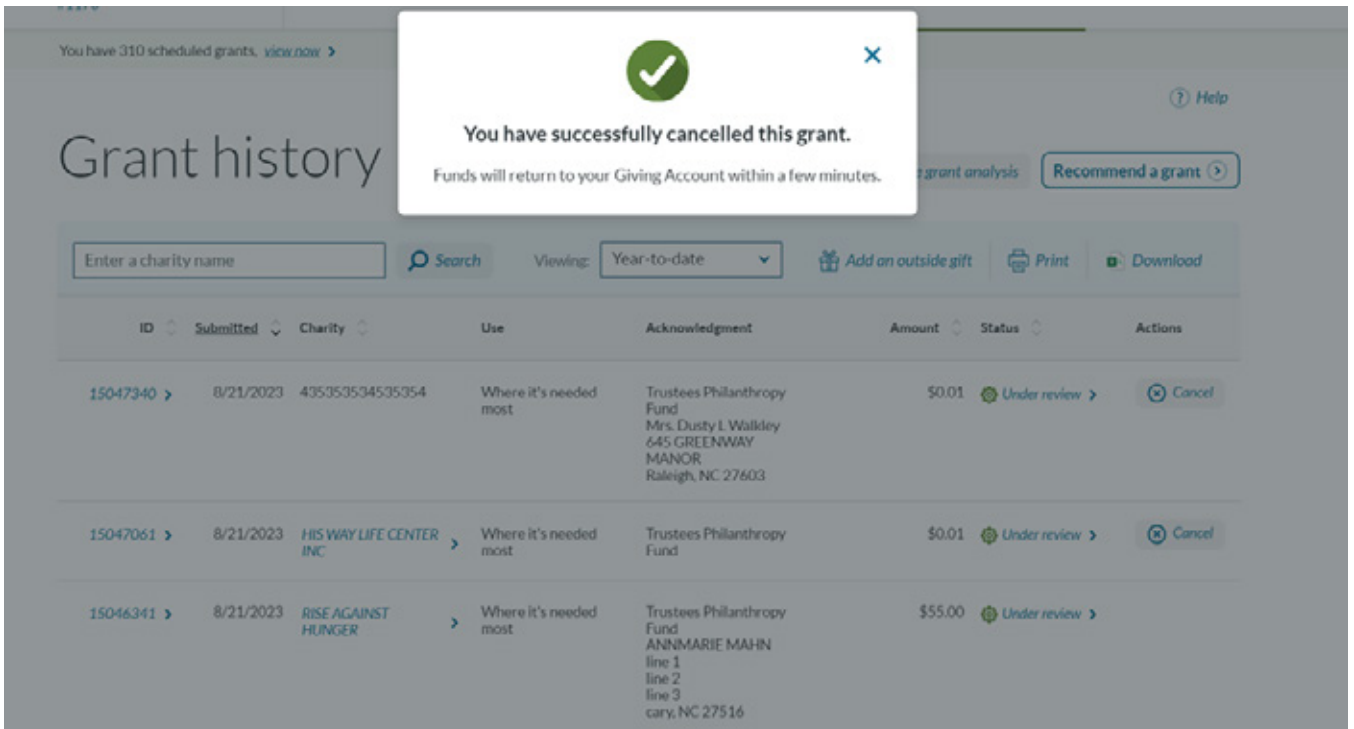
[Update now](#)

3. Find the grant recommendation you wish to modify or cancel. If the grant is eligible for cancellation, a “Cancel” button appears under the Actions column. Select “Cancel” and confirm by selecting “Cancel grant” to proceed.

Important note: When financial markets close, a grant recommendation in Payment processing status can no longer be cancelled.



4. Once complete, you will receive a confirmation notification. This could take a few minutes.



5. If you wish to edit your grant recommendation, please cancel and submit a new grant recommendation with the correct information using this [step-by-step guide](#).

Frequently Asked Questions

Can I cancel a grant funded from a managed account?

Grants funded by an advisor-managed account cannot be cancelled online. Please reach out to your advisor for further assistance.

What happens to my grant recommendation after trading hours?

At market close, grant recommendations with a status of *Payment processing* become ineligible for cancellation. If you are in the process of canceling at market close, an error message will appear, letting you know the grant recommendation can no longer be cancelled.

Conducting transactions online
is the easiest and most efficient
way to use your Giving Account

Need further assistance?

Call **1-800-952-4438** to speak with a member of our Donor Services team.