

**Here are some answers to common questions about our new Innovue client portal system:**

**Q** We received the new user account ID and temporary password, but we cannot access our account using this info.

**A** Log in to Innovue via this link: <https://innovue30.innovestsystems.com/ucf/ucf/>  
Select the “I am using a private machine” box at the top of the login page and use the username and temporary password provided. Upon logging on, you'll be required to select a custom password to use on a go-forward basis.

**Q** We are not sure of the email address to which the organization’s username and temporary password were sent.

**A** Reach out to [info@ucfunds.org](mailto:info@ucfunds.org), and we will send you your username and temporary password. Upon logging on to the system, you will be required to select a custom password to use on a go-forward basis.

**Q** We tried to access our account, but we were prompted with security questions to which we don't know the answer.

**A** Log in to Innovue via this link <https://innovue30.innovestsystems.com/ucf/ucf/>  
Select the “I am using a private machine” box – even if you're using a shared device – at the top of the login page. This step should resolve the issue, and you will then be prompted to change your password. You can also provide answers to security questions for using shared devices (see FAQ, above, for instructions for customizing your account profile).

If you're still experiencing problems accessing Innovue, please contact UCF's Client Services team at [info@ucfunds.org](mailto:info@ucfunds.org) or 877-806-4989. Please note that response times may be slightly delayed due to the high volume of inquiries we're currently receiving. We appreciate your patience.

**Q** How do I change our organization’s password, contact information, security questions or security phrase?

**A** At the top right of your organization’s portal homepage, there is a picture icon. Hover your cursor over the icon, and a Go to my Profile link will appear. Click on this link to change your primary email or phone number (either of which can receive the multi-factor authentication code upon login), or your security question and security phrase, which are used when logging in from a public machine.

**Q** Can I change our organization's username?

**A** No. The username, which typically starts with a "C" and ends with a state code (example: "OH"), is specific to your organization and often corresponds with your organization's ID number in the UCC yearbook.

**Q** Before entering the organization's username and password, should I check the box next to the phrase "I am using a private machine."?

**A** Yes. Checking this box will avoid having to respond to any security questions or to enter a security phrase.

**Q** We have two individuals who require regular access to our online client portal. Which person will receive the multifactor authentication (MFA) code?

**A** If your organization has two individuals requiring access to the online client portal, we recommend that one person receive the MFA security code by text and one person by email. Enter the email address and phone number for each individual, and each will then receive the MFA via the desired method.

**Q** When can our organization expect quarterly statements to be available for download from the portal?

**A** UCF requests five to eight business days after each quarter ends to make quarterly account statements available. Statements can be viewed and downloaded from the Statements and Documents tab on the portal.

If your organization needs updated account values between quarters, you can view those from the Account Summary section of the portal home page, or under the Positions tab if you want to view information by fund or asset class.

**Q** Where can we view completed transactions, such as withdrawals, deposits, investment activity or quarterly dividend reinvestments/payments?

**A** Under the Activity tab, you can view all transactions and search by the type of transaction over a specified time period. Transactions are posted on the day after they are completed by UCF's Client Services team.

**Q** What's the purpose for creating an Account Group on the portal?

**A** If your organization has multiple accounts managed by United Church Funds, creating an Account Group can categorize your organization's accounts by use (e.g. all operational accounts or all endowments), by distribution pattern (e.g. all accounts which reinvest dividends or take a quarterly cash payment), or other grouping specific to your church's needs and objectives.

**Q** Our account(s) are allocated to one of UCF's balanced funds, but the asset allocation graphic under "Your Asset Allocation" on the portal homepage does not show the asset allocation broken out by asset class. Where do I find that information?

**A** You can find detailed asset allocation and manager allocation information on the quarterly Fund Fact Sheet, which can be viewed and downloaded from our website at <https://ucfunds.org/home/fund-fact-sheets/>. Fund fact sheets for each fund are available six to eight weeks after each quarter ends.

**Q** How do we change the Authorized Officers and how often should we update UCF on these changes?

**A** Please use the **Authorized Account Signatory form** when a change of Authorized Officers occurs. We also encourage all of our clients to notify us when there is a change of Treasurer and/or Bookkeeper, Investment or Finance Committees, or Pastor.

**Q** What do I do if I don't see all of our accounts listed on the portal, can't locate a statement or have other questions?

**A** As always, you can contact UCF's Client Services Team at [info@ucfunds.org](mailto:info@ucfunds.org) or by calling us toll-free at 877-806-4989.