

Organizational Investing Client Portal User Guide

portal.ncfunds.com/EderFinancial

Your How-To-Enroll Guide

This **Organizational Investing Client Portal User Guide** will take you step-by-step through the account setup process, highlight key features, and help you navigate the [Organizational Investing Client Portal](#).

Begin Account Setup

Welcome to the Eder Financial Portal



Eder Financial

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Dear New User,

You have been granted access to the Eder Financial Portal.

Below is a temporary link that will automatically log you into the portal.

Once you are logged in, you will need to set your password and provide some additional information to complete your registration.

The password included in this message will expire in 48hours.

Your username is: useremail@domain.com

[Click here to set password](#)

1

Log In Steps

2

Log in to your account.

User name

Password

Login

[Forgot My Password](#)

1

New Users

You will receive an email titled **"Welcome to the Eder Financial Portal"** with a temporary link.

- Once you access the link, you will need to set your password.
- You have 48 hours from the time of receiving your welcome email to login and setup your password.
- After 48 hours, the activation link will expire. If your link expires before you setup your account, email OI@eder.org for a new link.

Next time you visit the website, you will enter your username and password on the login page.

2

Existing Users

- Go to ederfinancial.org, select **Organizational Investing** then **Client Portal**.

OR

- Log in directly to portal.ncfunds.com/EderFinancial

Enter your username and password, then select Login, to access the portal.

- If you forget your password, use **Forgot My Password** at the bottom of the login page to reset your password.

Additional Support

If you have questions or need help, please contact Eder Organizational Investing at OI@eder.org or **888-311-6530**. Representatives are available Monday through Friday from 8:00 a.m. to 4:00 p.m. Central Time.

Terms & Conditions



[Home](#) [Contact](#) [Help](#) [My Account](#) [Logout](#)

[Home](#) [Transactions](#) [PDF Statements](#)

WAIVER AND HOLD HARMLESS AGREEMENT RELATED TO USE OF THE EDER FINANCIAL PARTICIPANTS' INTERNET SITE

This Waiver and Hold Harmless Agreement sets forth terms, conditions and restrictions for use of the "Internet Site for Participants," hereinafter "Internet Site" of Eder Organizational Investing Inc., an Illinois not-for-profit corporation, hereinafter "EOII." The accounts and services provided by the EOII, including those which the authorized representative of an Eder Organizational Investing Inc client, hereinafter "participant," may access through the Internet Site, are governed by a separate Agreement between EOII and its asset management clients, hereinafter "the parties," which Agreement remains in full force and effect. This Waiver and Hold Harmless Agreement relating to the participant's use of the Internet Site is separate from and does not supersede the Agreement for participation in EOII's asset management services.

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I acknowledge and agree to the terms and conditions listed herein in this Waiver and Hold Harmless Agreement, agree to waive any and all liability arising out of my use of the Internet Site, and further agree to indemnify and hold harmless EOII, its agents, employees and representatives for any and all liability arising out of my use of the Internet Site.

Agreed [Sign](#)

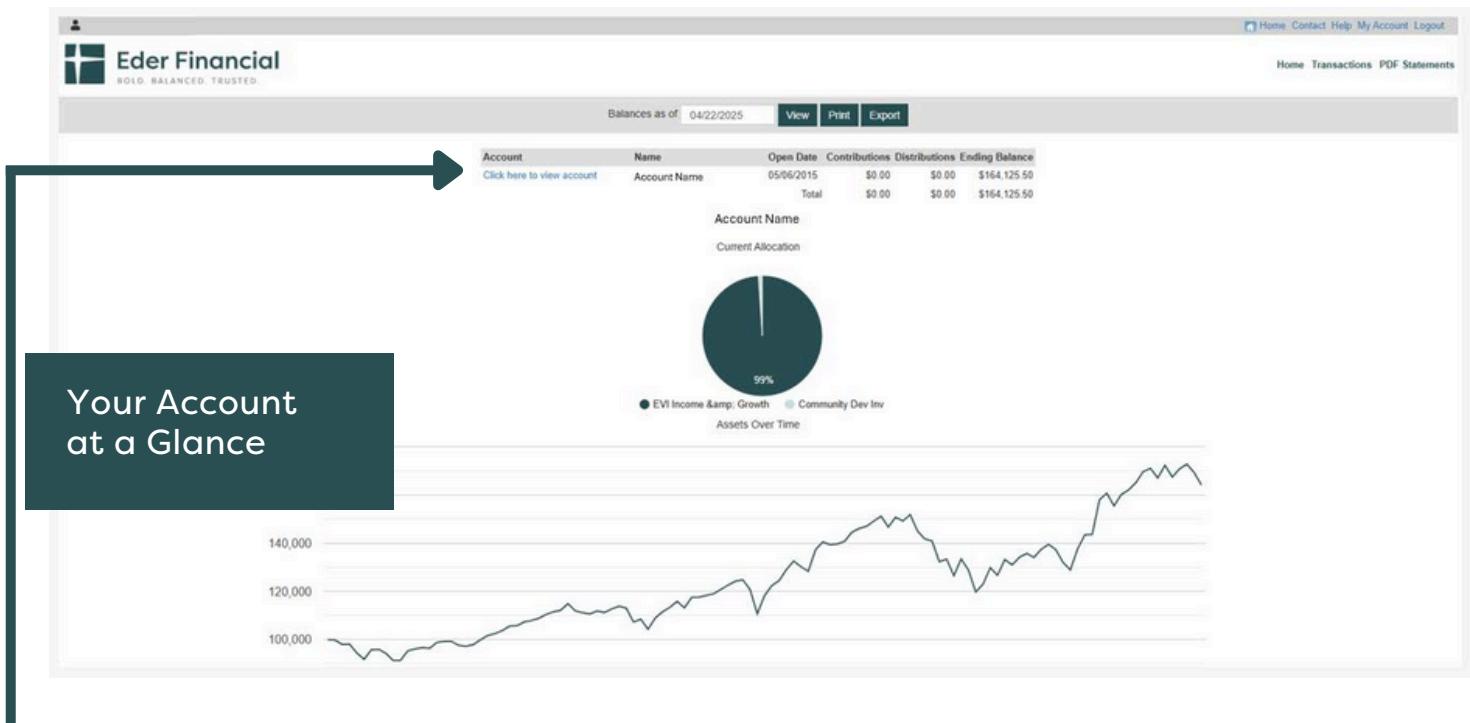
For questions or technical support please contact Eder Organizational Investing.
Phone: 888-311-6530 Email: OI@eder.org

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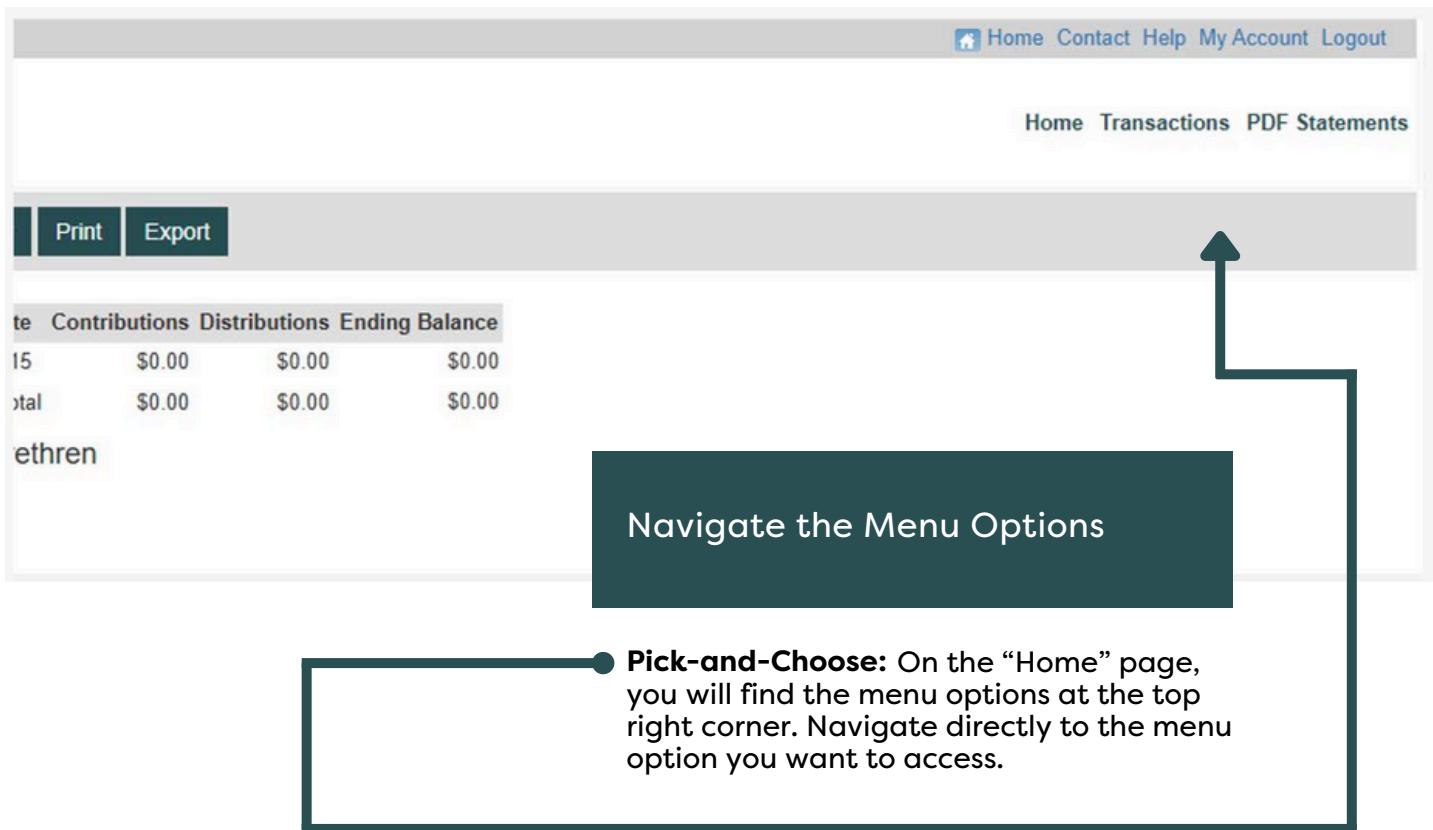
Agree to the **Waiver and Hold Harmless Agreement** to begin using the portal.

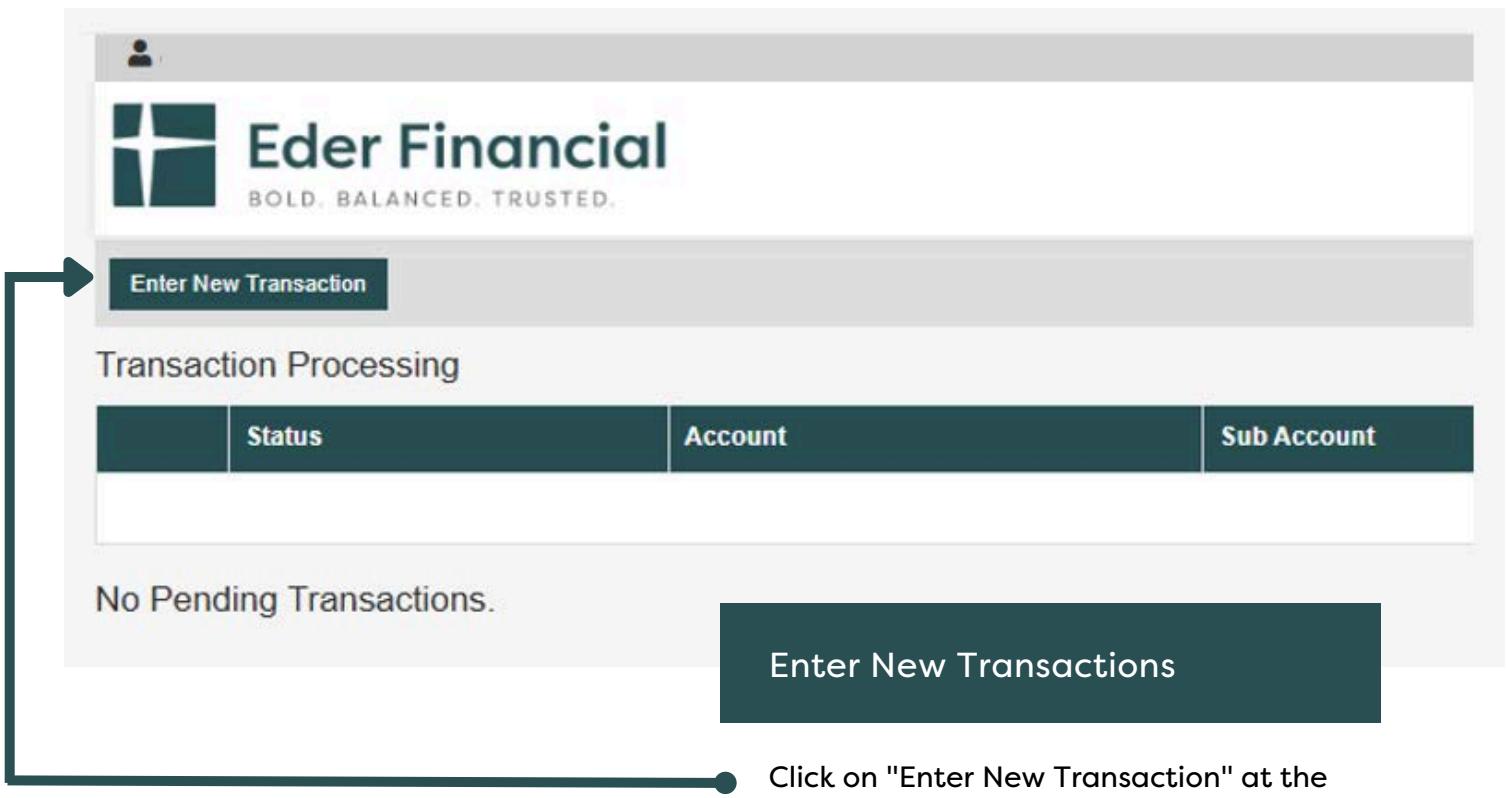
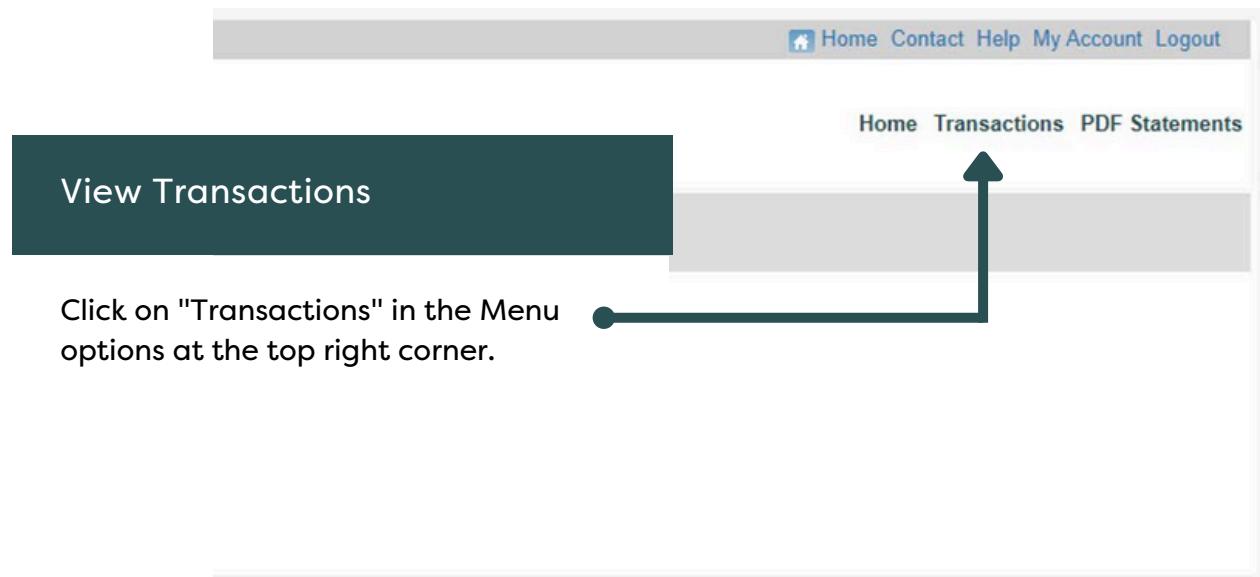
Verify Your Information

Please take time to make sure everything is accurate on portal.ncfunds.com/EderFinancial.
Check your personal information in My Account settings.



Home Screen: This is your account at a glance. Click on the link to your Account Name to view Transaction Reports, Investment Intelligence Articles, Fund Performance Reports, and the Current Information Statement.





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Transactions Pending Transactions Select Account

New Transaction

Entered By: Date/Time: 04/24/2025 03:49 PM

The current day trade cutoff time has passed. The Trade Date has been advanced to the next business day.

Account: 00-000-000 Account Name
Sub Account: Sub Account Name

Transaction Type: Contribution

Payment Method: Contribution

Transaction Date: Distribution

Transaction Amount: Transfer

On behalf of the organization I represent, I understand and accept the [Risk Disclosure Statement](#) (click to review statement).

Special Instructions:

Please make check payable to Eder Financial, and send with a printed copy of this screen to:
Eder Financial,
1505 Dundee Avenue
Elgin, IL 60120

Enter Transaction Print Cancel Changes

Choose the Type of Transaction

In the **New Transaction** screen, you will need to choose the type of transaction.

Account: 00-000-000 Account Name
Sub Account: Sub Account Name

Transaction Type: Contribution

Payment Method: Check

Transaction Date: Check

Transaction Amount: EFT

On behalf of the organization I represent, I understand and accept the [Risk Disclosure Statement](#) (click to review statement).

Choose the Payment Details

Choose the payment method.

Note: The preferred payment method is electronic funds transfer (EFT). Please be aware that requesting payment by check may result in an additional processing fee.

Entered By: Date/Time: 04/24/2025 03:49 PM

The current day trade cutoff time has passed. The Trade Date has been advanced to the next business day.

Account: 00-000-000 Account Name
Sub Account: Sub Account Name

Transaction Type: Contribution

Payment Method: Check

Transaction Date: 04/25/2025

Transaction Amount: 0.00

On behalf of the organization I represent, I understand and accept the [Risk Disclosure Statement](#) (click to review statement).

Special Instructions:

Please make check payable to Eder Financial, and send with a printed copy of this screen to:
Eder Financial,
1505 Dundee Avenue
Elgin, IL 60120

Enter Transaction Print Cancel Changes

- The transaction date will be auto-filled with today's date.
- Enter the transaction amount.
- Click to agree to the Risk Disclosure Statement.
- Enter any Special Instructions.
- Investment Allocations - Click the checkbox to "Use the investment allocations on file" as shown, or enter the percent or amount desired.
- Click "Enter Transaction". Review for accuracy and then click "Confirm Transaction".

Home Transactions PDF Statements

View Statements

Click on "PDF Statements" in the
Menu options at the top right
corner.



View Statements

Files

-  2011
-  2012
-  2013
-  2014
-  2015
-  2016
-  2017
-  2018
-  2019
-  2020
-  2021
-  2022
-  2023
-  2024
-  2025

Name Modified Size

No Files or Folders



Click on the year of
the statement you'd
like to view.



View Statements

Files

- [📁 2011](#)
- [📁 2012](#)
- [📁 2013](#)
- [📁 2014](#)
- [📁 2015](#)
- [📁 2016](#)
- [📁 2017](#)
- [📁 2018](#)
- [📁 2019](#)
- [📁 2020](#)
- [📁 2021](#)
- [📁 2022](#)
- [📁 2023](#)
- [📁 2024](#)
- [📁 2025](#)

- [📁 January](#)
- [📁 February](#)
- [📁 March](#)

Name	Modified	Size
📁 January	2/03/2025 16:45 PM	
📁 February	3/04/2025 17:11 PM	
📁 March	4/07/2025 12:49 PM	

Click on the month of the statement you'd like to view.



View Statements

Files

- [📁 2011](#)
- [📁 2012](#)
- [📁 2013](#)
- [📁 2014](#)
- [📁 2015](#)
- [📁 2016](#)
- [📁 2017](#)
- [📁 2018](#)
- [📁 2019](#)
- [📁 2020](#)
- [📁 2021](#)
- [📁 2022](#)
- [📁 2023](#)
- [📁 2024](#)
- [📁 2025](#)

- [📁 January](#)
- [📁 February](#)
- [📁 March](#)

Name	Modified	Size
📁 Account Name - 00-000.pdf	4/01/2025 17:31 PM	349.87 KB

Click on the link of the statement you'd like to view. The PDF file will auto-download onto your device.

Need Help?

If you have questions or need help, please contact Eder Organizational Investing at OI@eder.org
888-311-6530. Representatives are available Monday through Friday from 8:00 a.m. to 4:00 p.m. Central Time.



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