



**Eder Financial**

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# Organizational Investing Client Portal User Guide


**[portal.ncfunds.com/EderFinancial](https://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



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 48 hours.

Your username is: useremail@domain.com

[Click here to set password](#)

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### 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](mailto:OI@eder.org) for a new link.

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

## Log In Steps

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Log in to your account.

User name

Password

Login

[Forgot My Password](#)

2

### Existing Users

- Go to [ederfinancial.org](http://ederfinancial.org), select **Organizational Investing** then **Client Portal**.

OR

- Log in directly to [portal.ncfunds.com/EderFinancial](http://portal.ncfunds.com/EderFinancial)

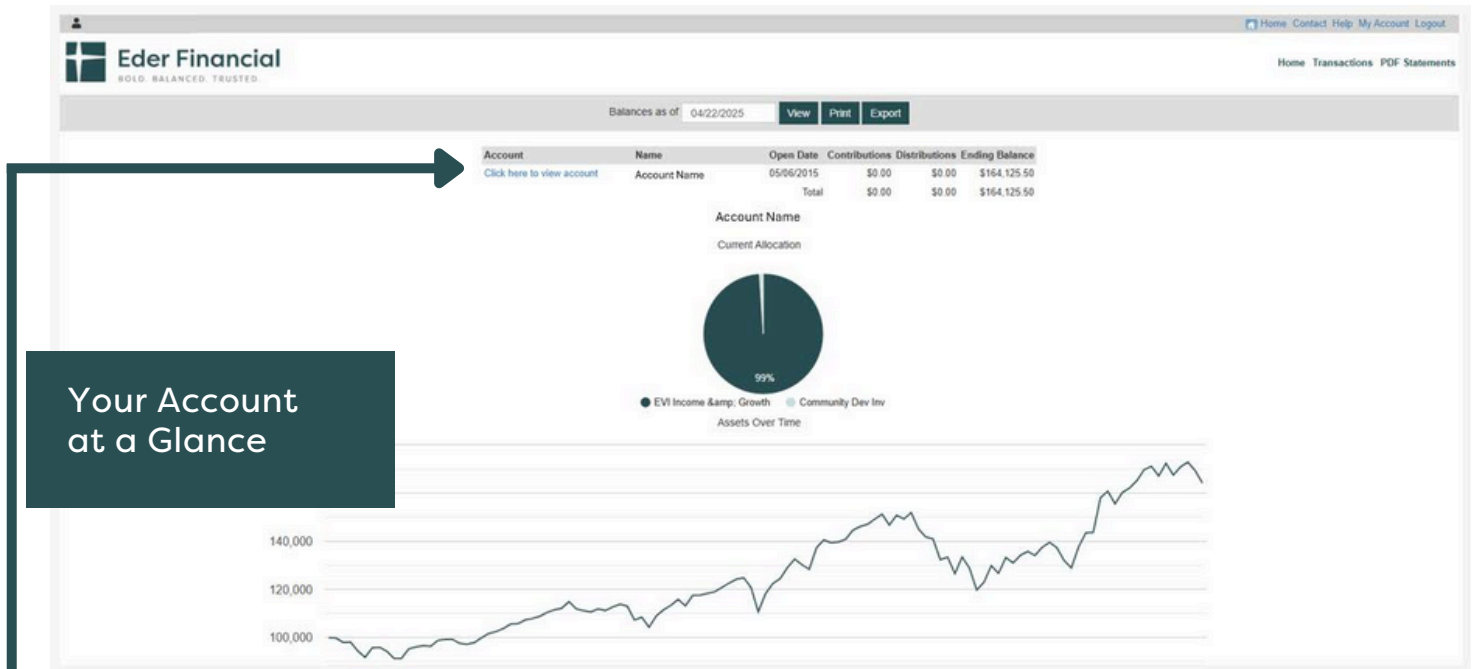
Enter your username and password, then select Login, to access the portal.

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

## Additional Support

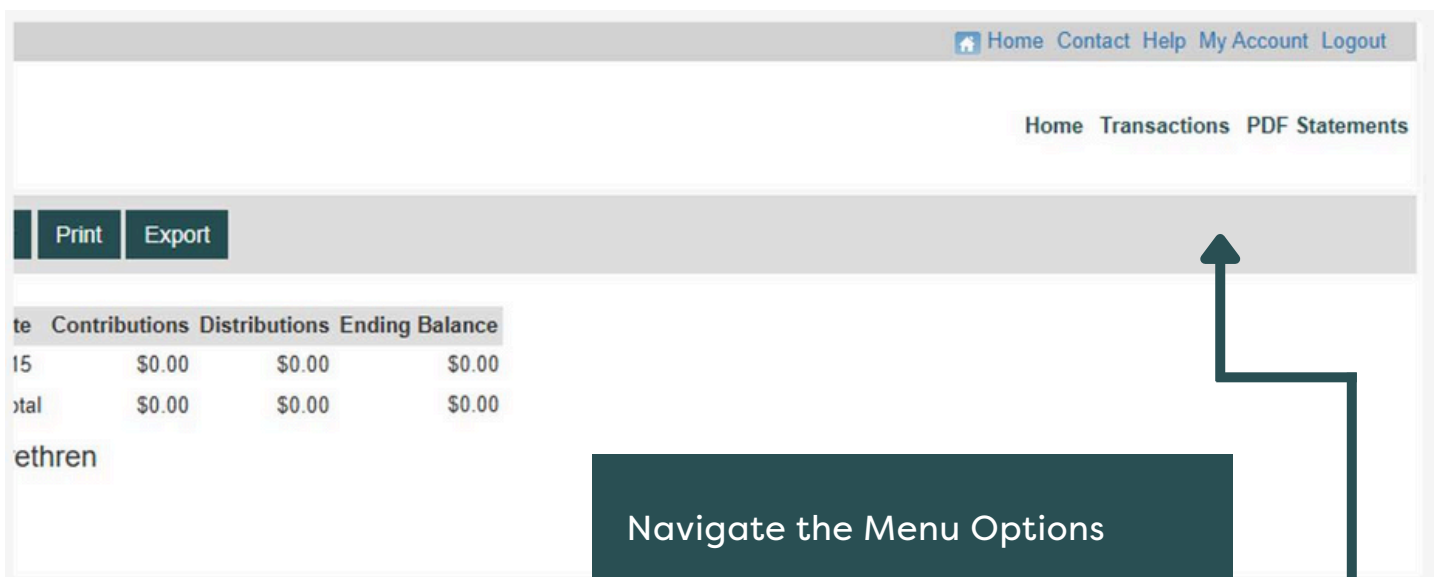
If you have questions or need help, please contact Eder Organizational Investing at [OI@eder.org](mailto:OI@eder.org) or **888-311-6530**. Representatives are available Monday through Friday from 8:00 a.m. to 4:00 p.m. Central Time.



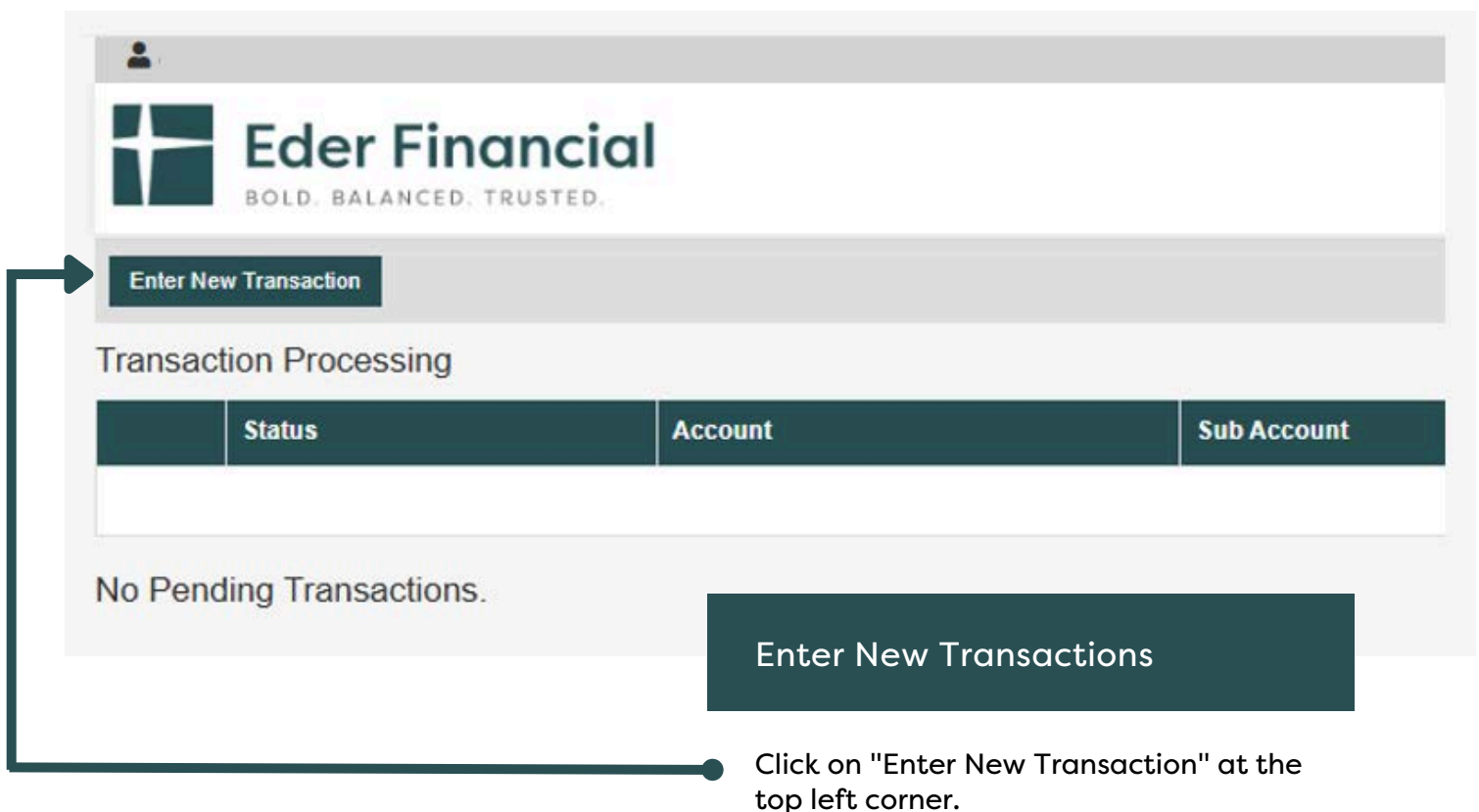
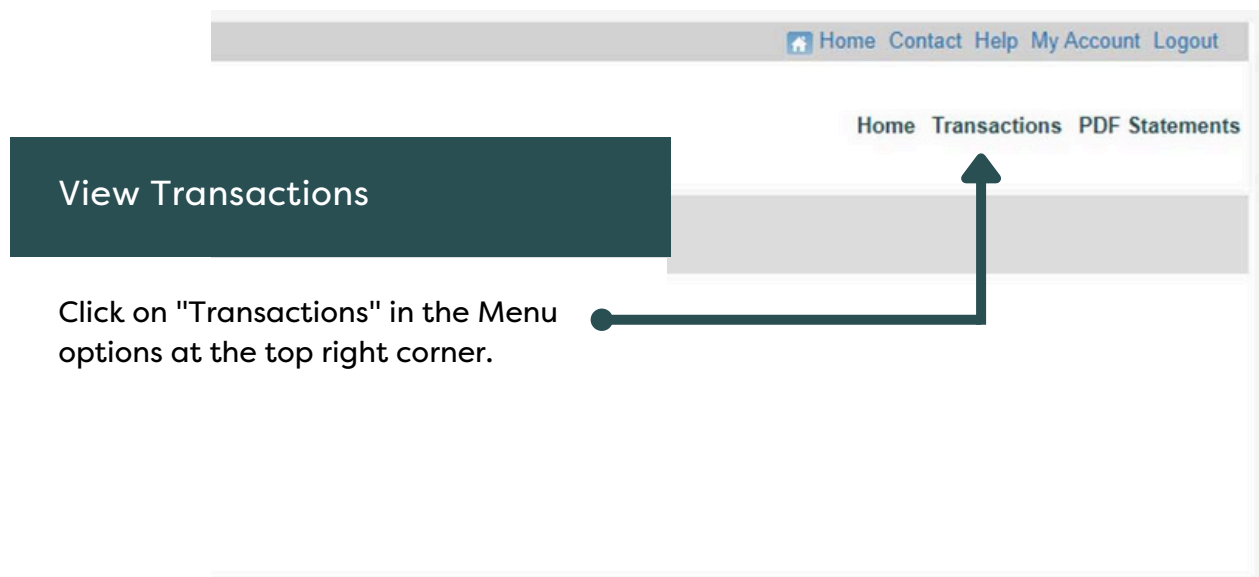


## Your Account at a Glance

● **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.



● **Pick-and-Choose:** On the “Home” page, you will find the menu options at the top right corner. Navigate directly to the menu option you want to access.



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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:

Transaction Date:

Transaction Amount:

☐ 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:

Transaction Amount:

☐ 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

☐ Use investment allocations on file ☐ Show all available investment pools.

Fund	Allocations	Percent	Amount
Balanced	100%	0.00	0.00
Total	100%	0%	\$0.00

- 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".

## View Statements

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



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## 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.





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### 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.



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### 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](mailto: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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Client Portal Website: [portal.ncfunds.com/EderFinancial](http://portal.ncfunds.com/EderFinancial)

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Investing 888-311-6530  
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Email Address: [OI@eder.org](mailto:OI@eder.org)