

Classic 2.0 Template Guide

Updated with demo report screenshots

Front Cover

COPY

All headings are always all caps.

The report title should be 25–55 characters with spaces and fit on 1–3 lines.

IMAGERY

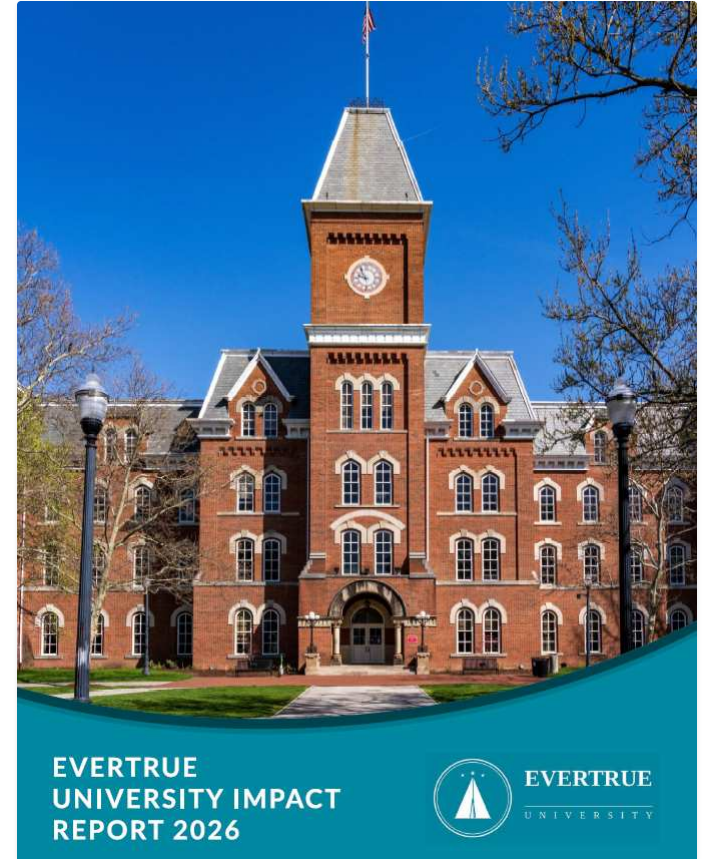
Full-bleed cover background must be sized to 2625 × 3375 pixels and be a JPG, JPEG, or PNG.

Institution logo should be a transparent PNG sized to fit 900 × 345 pixels. Since the logo sits on the organization's primary color, any primary color in the logo will fade into the background — we suggest an all-white or all-black version here instead.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — this is a static, template-level asset.

Images must be optimized to 300 DPI for best print quality.



Leadership Message

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

Statement content (justified by default) from organization or foundation leadership, providing a narrative to the stewardee.

Statement body can run up to 1,800 characters with spaces across up to 5 paragraphs (not including author name/title).

Author name has no fixed character limit; author title should be 60 characters or fewer with spaces.

This page is static, so the content created in the template will apply to all reports using this template.

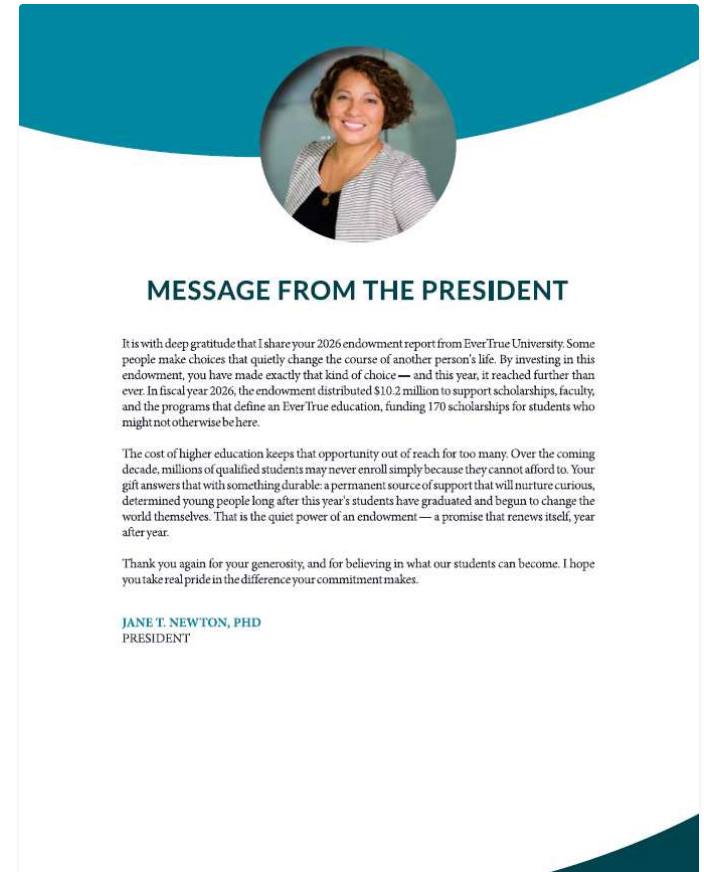
IMAGERY

Leadership headshot must be 750 × 750 pixels and either JPG, JPEG, or PNG format.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Overview

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

An overview of the organization's endowment program, investment policies, and/or overall endowment performance for the year.

Statement body can run up to 2,000 characters with spaces across up to 5 paragraphs.

This page is static, so the content created in the template will apply to all reports using this template.

IMAGERY

Required portrait sidebar photo must be sized to 998 × 3095 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



ENDOWMENT OVERVIEW

EverTrue University's endowment is a dedicated and permanent source of funding that sustains the teaching and research mission of the University. Made up of hundreds of individual funds invested together as a single pool, the endowment's returns support financial aid, innovative research, and endowed professorships across the University's schools and colleges.

Each year, a measured portion of the endowment is paid out as an annual distribution to support the University's budget. Any appreciation beyond that distribution is reinvested and retained, so the endowment can continue to grow and support future generations. In this way, the endowment provides a financial foundation the University can rely on for decades to come. In fiscal year 2026, it distributed \$10.2 million toward research, scholarships, and program support.

Distributions from the endowment are a critical source of funding for the University. The overwhelming majority of these funds are restricted gifts that must be spent in accordance with the terms set forth by the donor who created them. Payout from a restricted fund can only be used in support of that fund's designated purpose — which means your gift does precisely what you intended it to do, this year and every year that follows.

Endowment Performance

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

This static page uses up to 3 chart images or supporting imagery that complement the Overview page. For best quality, these images should ideally not contain embedded copy.

Statement body: up to 400 characters with spaces across 3 blocks (one block per chart/image).

This page is static, so the content created in the template will apply to all reports using this template.

IMAGERY

Each chart image must be sized to 1080 × 660 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Flex Page

COPY

All headings are always all caps.

Intended for any additional content needed for reporting — for example, a message from a second leadership voice, as shown in the updated sample.

Statement body can run up to 1,800 characters with spaces across up to 5 paragraphs (not including the page heading).

This page is static, so the content created in the template will apply to all reports using this template.

IMAGERY

Header photo (required default) should be 2625 × 1440 pixels and a PNG, JPG, or JPEG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Statistics Page

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

A visual way to share important data with the steward. Up to 6 stats are available.

Each stat's data value should be 7 characters or fewer with spaces; each corresponding descriptive should be 30 characters or fewer with spaces.

This page is static, so the content created in the template will apply to all reports using this template.

IMAGERY

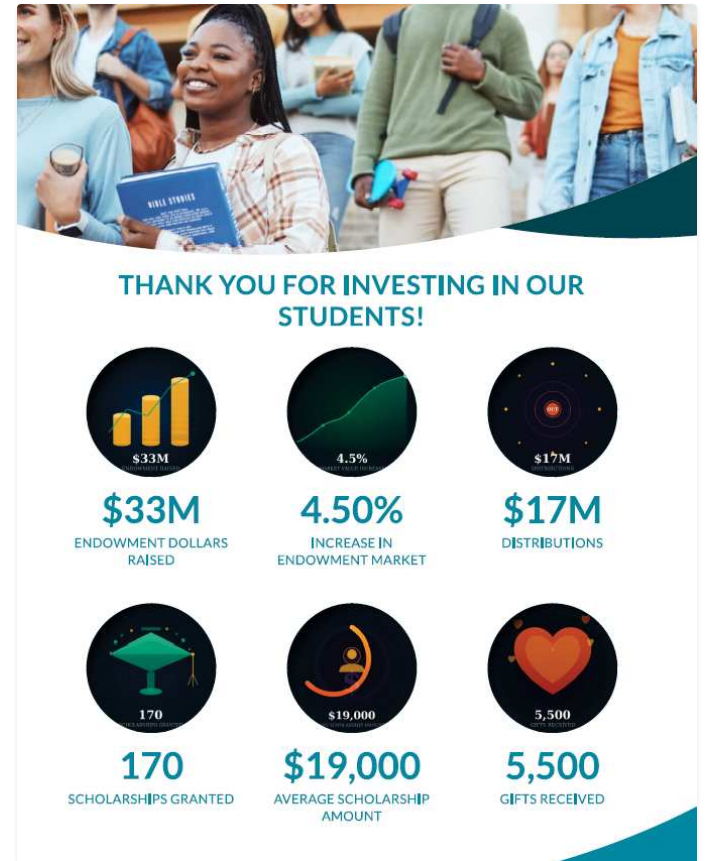
Required banner header photo must be sized to 2625 × 1050 pixels.

Each of the 6 circle photos must be sized to 450 × 450 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Financial Pages

COPY

There are multiple versions of this page chosen during onboarding and setup.

Most content here is added dynamically to a report based on the funds being reported on. Fund info (fund header and narrative) correlates directly to fields in Balance. The fund header pulled in from Balance is always all caps.

Fund Header should be 40–50 characters with spaces; Fund Narrative should be 40–50 characters with spaces. Together, fund header + narrative can run up to 300 characters with spaces.

IMAGERY

Fund header photo is required and must be sized exactly to 2625 × 1380 pixels and be a JPG, JPEG, or PNG.

Footer logo should be a PNG on a transparent background sized to fit 600 × 195 pixels.

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per template.

Images must be optimized to 300 DPI for best print quality.



FINANCIAL REPORT

BALLET FUND

FUND PURPOSE
The Ballet Fund is an Annual Arts and Sciences Scholarship fund that goes to a student with a GPA of 3.0 or higher with a financial need.

FUND PERFORMANCE	
Beginning market value 7/1/2025	\$ 1,708,552.68
Investment performance	\$ 0.00
Distributions	\$ 0.00
Transfers	\$ 0.00
Contributions	\$ 0.00
Ending market value 6/30/2026	\$ 0.00
Ending contributed value 6/30/2026	\$ 0.00

ID: proof

FUND: 600009

EVERTRUE
UNIVERSITY

Recipient List

COPY

Heading is the fund name pulled in from Balance and is always all caps. You control the heading and subheading shown above the list of recipients.

Heading should be 40–50 characters with spaces; subheading should be 40–50 characters with spaces.

This page's content updates dynamically according to recipient details collected through our imports. Please use the import templates we provide and check content for visual consistency.

IMAGERY

Header logo should be a PNG on a transparent background, 300 DPI, sized to fit within 600 × 390 pixels.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — sourced from recipient import data associated with each fund.

Images must be optimized to 300 DPI for best print quality.



EVERTRUE
UNIVERSITY

IMPACT THIS YEAR
BALLET FUND

SCHOLARSHIP IMPACT

- These recipients were awarded \$15,000 this fiscal year.
- These recipients all met or exceeded a 3.4 GPA in their studies.

SCHOLARSHIP RECIPIENTS

NAME	HOMETOWN	MAJOR	YEAR
Isabel Archibald	Cleveland, OH	Physical Education	2025
Sara Bailey	Bangor, ME	Business	2025
Aki Lee	San Francisco, CA	American History	2025
Henry Lei	Northampton, MA	Psychology and History	2025
Margaret O'Hara	Wellesley, MA	Occupational Therapy	2025

ID: proof FUND: 600009



EVERTRUE
UNIVERSITY

Question + Answer

COPY

All headings are always all caps. This page is dynamically generated from the recipient impact(s) related to the funds being reported on.

Up to 5 questions are supported. Each question should be 80 characters or fewer with spaces; each answer should be 250 characters or fewer with spaces.

This content can be imported into your Impact site — let us know if you'd like to explore that option.

IMAGERY

Header photo must be sized to exactly 2625 × 1290 pixels (1 per template).

Recipient circle photo (optional default) must be sized to 840 × 840 pixels and be a JPG, JPEG, or PNG (1 per recipient, defaults available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — header photo is 1 per template; circle photo is 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



**EMMA
RODRIGUEZ '27**

BIOLOGY
SPRINGFIELD, IL

TELL A LITTLE ABOUT YOURSELF
I am someone who is really passionate about the starting my own business. That's why I plan on majoring in business with a minor in entrepreneurship. In my spare time, I like to SCUBA dive and hang out with friends.

WHAT IS YOUR GREATEST STRENGTH?
I would say my greatest strength is my ability to focus. When I am passionate about something, nothing can stop me from focusing and achieving my goal. I put in time and energy to make sure things are done, and done right.

WHY DO YOU DESERVE THIS SCHOLARSHIP?
I watched my father start his own businesses, and he failed both times he tried. He passed away before he could achieve his dream, and I want to succeed so that he knows he inspired me. I'd like to inspire future generations as well.

WHAT ARE YOUR CAREER GOALS?
I hope to open a business that assists underprivileged teens achieve their college and career goals.

WHO IS YOUR ROLE MODEL?
My role model is my father. He never gave up and worked two jobs, while at the same time trying to start his own businesses. Although his businesses never gained traction, I gained a lot of inspiration from watching his work ethic.

ID: proof FUND: 600009



Thank You Horizontal

COPY

Heading is the fund name pulled in from Balance and is always all caps.

Message content (justified by default) with an optional associated image is added dynamically from recipient impact(s) tied to the funds being reported on.

Personal letter/statement can run up to 1,800 characters with spaces across up to 5 paragraphs.

We can enable bulk import of these impacts — let us know if you'd like to do this.

IMAGERY

Header image must be sized to exactly 2625 × 1650 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



BALLET FUND

Dear Friend of the Whitfield Family Scholarship, I still remember opening the email that told me I'd been selected to receive this scholarship. I read it three times before it felt real, and then I called my mom right away because I knew she'd want to celebrate with me. Thank you, from the bottom of my heart, for your generosity and for believing in students like me.

This scholarship has changed the trajectory of my college experience in ways I don't think I can fully put into words. Before receiving this award, I was working two part-time jobs just to cover textbooks and lab fees, which left very little time or energy for the research opportunities I came to college hoping to pursue. Your support lifted that weight off my shoulders. This past semester, I was able to cut back my hours and join Dr. Alvarez's cellular biology lab, where I've spent countless afternoons running assays and learning techniques I used to only read about in textbooks.

I'm currently working toward a degree in Biology with a minor in Chemistry, and I hope to pursue a PhD in molecular biology after graduation.

The research experience your scholarship made possible has only sharpened that goal. Just last month, our lab identified a promising pattern in cell response data that our team is now preparing to submit for publication, and I got to be part of that process from the very beginning. I don't think I would have had the bandwidth to take on that opportunity without the financial breathing room this scholarship provided.

Beyond the lab, this scholarship has given me the chance to actually enjoy being a student. I've joined the campus Science Outreach Club, where we bring hands-on experiments to local elementary schools, and I've started mentoring a first-year student who is navigating the same financial pressures I once faced. I want to pass along the kind of support you gave me.

Thank you again for investing in my education and in my future. I promise to make the most of this gift, both in the classroom and in the lab, and I hope to one day be in a position to support a student the way you have supported me. With sincere gratitude and appreciation,

EMMARODRIGUEZ '27

ID: proof FUND: 600009



Thank You Vertical

COPY

Heading is the fund name pulled in from Balance and is always all caps. If the fund name is too long, it is replaced with a "Thank You" heading.

This page is built dynamically using recipient impact content and optional imagery. Add a default image to use when individual recipient images don't exist.

Personal letter/statement can run up to 1,000 characters with spaces across up to 4 paragraphs.

These recipient impacts can be imported in bulk — let us know if you'd like to explore that option.

IMAGERY

Header image must be sized to exactly 2625 × 1650 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



BALLET FUND

Dear Scholarship Donor, Thank you so much for your generous support. Receiving this award meant I could finally stop worrying about how I would afford next semester's lab fees and textbooks, and start focusing on the coursework and research that brought me to college in the first place.

This year I joined a cellular biology research lab, something I'd wanted to do since freshman orientation but never had the time for while working two jobs. Your scholarship gave me that time back, and I've spent it learning techniques I used to only read about, running assays, and even contributing to a dataset our team hopes to publish soon.

I'm working toward a degree in Biology with a minor in Chemistry, with plans to pursue a PhD in molecular biology after graduation. Every hour I spend in that lab now feels like a direct result of your generosity, and I don't take that for granted.

Thank you for seeing potential in me and for helping make this chapter of my education possible. I hope to carry your kindness forward in my own career.

EMMA RODRIGUEZ '27
Springfield, IL

ID: proof FUND: 600009



Narrative + Quote

COPY

Heading is the fund name pulled in from Balance and is always all caps.

Copy and an optional associated image are added dynamically based on the recipient impact(s) tied to the funds being reported on.

Narrative/statement can run up to 800 characters with spaces across up to 4 paragraphs; the quote should be 300 characters or fewer with spaces.

We offer bulk import of copy and imagery — let us know if you're interested.

IMAGERY

Header image must be sized to exactly 2625 × 1650 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



BALLET FUND

When I opened the email letting me know I'd been selected for this scholarship, I honestly had to read it twice before it felt real. I called my mom right away because I knew she'd want to celebrate with me, and I'm still so grateful your generosity made this moment possible.

This past semester, your support allowed me to cut back my work hours and finally join a cellular biology research lab, something I had hoped to do since orientation. I've spent countless afternoons running assays and learning hands-on techniques I used to only read about in textbooks.

I'm working toward a degree in Biology with a minor in Chemistry, and I hope to pursue a PhD in molecular biology after graduation. Thank you for investing in that future and for giving me the room to grow into the researcher I'm becoming. Every hour I spend in the lab now feels like a direct result of your generosity, and I try not to take a single one of them for granted.

Your generosity gave me the time and space to finally do the research I came to college hoping to do.

— Emma Rodriguez '27

ID: proof FUND: 600009



Glossary

COPY

Terms and explanations for the stewardee. This is a static page that will be the same for all reports using this template.

Up to 10 terms are supported. Each term should be 70 characters or fewer with spaces; each definition should be 200 characters or fewer with spaces.

Set up in two columns by default.

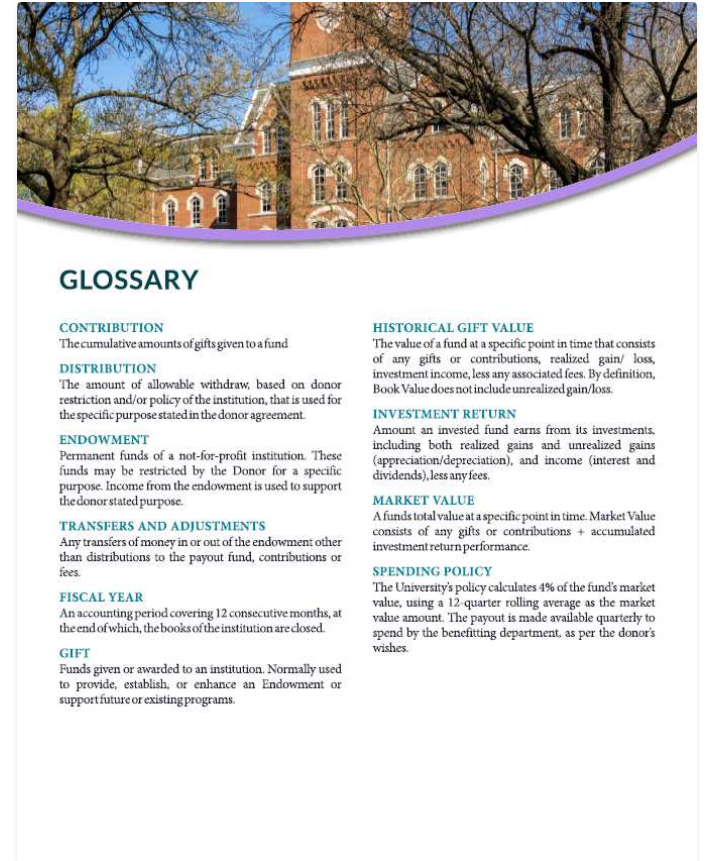
IMAGERY

Header photo must be sized to exactly 2625 × 1380 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Back Cover

COPY

This is a static page that will be the same for all reports using this template.

Up to 5 address lines are supported, each 45 characters or fewer with spaces; closing descriptive should be 250 characters or fewer with spaces.

IMAGERY

Background photo must be sized to exactly 2625 × 3375 pixels and be a JPG, JPEG, or PNG.

Logo (light version) should be a transparent PNG sized to fit 600 × 420 pixels. Since the logo sits on the organization's primary color, any primary color in the logo will fade into the background — we suggest an all-white or all-black version here.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.

