

Starting with the log-in page. Please make sure you have set up your password on the site and contact Kaylah with any questions about logging on.

Phone 860.229.6018 | info@cfgnb.org



Choose Fund

- CFGNB Donor Advised Fund
- Georgia Knapp Thomson Fund

Mailing Address: 74A Vine Street, New Britain, CT 06052 - Phone: 860.229.6018
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If you only have access to one fund, it will show you that fund's information when logging in; however, if you have access to multiple funds, this screen will give you an option for selecting the fund you would like to review.

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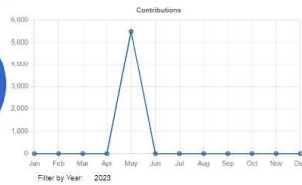


CFGNB Donor Advised Fund

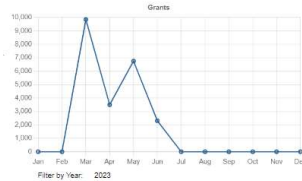
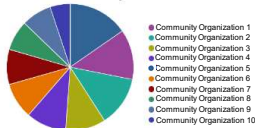
- Home
- Choose Fund
- Gifts To Your Fund
- Grant History
- Grant Recommendations
- Files
- Donate To A Fund
- Logout

Date Created: 12/12/2022
Current Balance: \$550,000
Spendable Balance: \$500,000
Total Contributions: \$5,500.00
Total Grants: \$22,400.00

Top 10 Contributors



Top 10 Grantees




The "Home" tab shows the fund's current balance.

Below that you will see the fund advisors (or fund representatives) that have access to the fund, recent contributions to your fund, and recent grants from your fund.

Please note: The Current Balance is what is in the fund, while the Spendable Balance takes into account any of the grants that are pending and have not yet been paid.

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CFGNB Donor Advised Fund

Home Choose Fund **Gifts To Your Fund** Grant History Grant Recommendations Files Donate To A Fund Logout Export

Contributions

Date	ID	Contributor	Description	Type	Amount
05/26/2023	21098	Community Impact Fund		Internal Grant	
05/24/2023	21173	Community Foundation of Greater New Britain		Other Payment	

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The "Gifts To Your Fund" tab shows contributions to your fund in greater detail. Clicking on the contributor's name will provide giving history to your fund starting 2023 (when CFGNB launched this platform).

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Grantee Summary

Grantee	Grants	Amount
Community Organization 1		
Community Organization 2	2	1,000.00
Community Organization 3	1	1,000.00
Community Organization 4	1	1,000.00
Community Organization 5	1	1,000.00
Community Organization 6	1	1,000.00
Community Organization 7	1	1,000.00
Community Organization 8	1	1,000.00

Grants

ID	Date	Status	Recipient	Description	Amount	Copy
10406	06/13/2023	Pending		Golf Tournament	500.00	Copy
10339	06/09/2023	Paid		Summer Musical "The Wedding Singer"	1,000.00	Copy

The "Grant History" tab shows:

- 1.) A Grant Summary with your past grant recipients in alphabetical order
- 2.) A Grants listing of grants made from the fund. **If you have a Donor Advised Fund, you can click "copy" to initiate a new grant to the same recipient.**

Donor Advised Fund Representatives also have access to a “Grant Recommendations” tab.

On the left, is where grant requests are created by either:

1. Selecting from previous grantees
2. Searching through existing grantees in our database
3. Entering grantee information manually

On the right, there is a list of grants requested and their status. This tells you whether the Foundation is pending more information (a signed grant letter), or has paid the grant.

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[Profile](#)

CFGNB Donor Advised Fund

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Files

Date	Filename	Description
01/31/2023	Fund Agreement.pdf	

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Use the “Files” tab to find an electronic copy of your fund agreement.

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Home **Donate To A Fund**

You can donate to any of these funds online. If you have any questions, please contact Kaylah Milligan at (860) 229-6018 ext. 305 or by email at Kaylah@cfgnb.org.

Donate To A Fund

Fund Name	Description
Donor Advised	
CFGNB Donor Advised Fund	Donate A donor advised fund to support a variety of charitable purposes.

Other Funds

Search [show all funds list](#)

The "Donate to a Fund" tab makes it quick and easy to make a donation to your fund.

Click "show all funds list" in order to see the other CFGNB funds you could donate to.

MORE TO COME...

As more functionality is available, we will update the Donor Portal to give our Fund Representatives as much accessibility as possible. Be on the lookout for additional tabs and information!

Please reach out to Kaylah with any questions or concerns.
Kaylah@cfgnb.org (860) 229-6018 ext.305

