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.
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.

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.
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).

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.

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