

Place Based Impact Investment Application

The Foundation is eliciting requests for funding for targeted capital investments to address social issues. The key areas targeted by the Foundation at the current time are a) access to economic opportunity, b) education and c) programs providing affordable places and inclusive spaces. Your program, if funded, will be required to provide a social benefit to the community and a financial return to the Foundation. Investments may be loans, loan guarantees, and ownership capital.

Proposal

Proposal Information

*If you enter a response and the field remains red, the information you've entered is incompatible with the field's requirements. For example, if you enter '70%' and the field is still red, try entering simply '70.'

ORGANIZATION INFORMATION

Organization's Name:

Organization's EIN (Employer ID #):

Mailing address:

City: **State:** **Zip Code:**

Is your Physical Address the same as your Mailing Address?

Physical address:

City: **State:** **Zip Code:**

Website address:

Contact person for this investment:

Contact's email address:

Telephone number:

Does your organization have a diversity/inclusion policy?

PROPOSAL

Please explain the investment opportunity you are proposing:

Indicate the area(s) that best describes the investment's focus:

Please indicate the investment type requested. (Investment Type) ▾

Requested Investment or Guarantee Amount: (Requested Amount)

Target Return: (Target Return)

In years, please indicate the anticipated time horizon. (Time Horizon)

Please indicate the geographical area served by this opportunity. (Geographic Area) ▾

What is the social benefit of this investment opportunity for the intended population?

(Social Benefit)

The Foundation is committed to improving inclusivity in the communities we serve. What impact does this opportunity make on social and economic inclusivity?

(Impact on Inclusivity)

What is the financial benefit of this investment opportunity for the intended population?

(Financial Benefit)

RISK ASSESSMENT

Please describe the potential risks to this investment and means available to mitigate these risks?

(Risks)

What factors may cause this investment to not reap the social benefits to the community?

(Social Risks)

What factors may cause the Foundation to lose principal or not receive an adequate financial return on its investment? Additionally, please explain your cash flow expectations from this project.

ADDITIONAL INFORMATION

Please indicate your organization's entity type.

Please provide your current board list and, if applicable, list the principals of your organization.

If you are a non-profit required to file the IRS Form 990, please provide your most recent 990.

Please provide the most recently audited financial statement, income statement and a balance sheet, if available.

EXAMPLE