CDFI Investments for Socially Conscious Investors

Community Development Financial Institutions (CDFIs) are community lenders that support, grow, and revitalize underserved communities.

They work to provide affordable loans and financial services to individuals, businesses, and communities that have been overlooked by traditional sources of financing. At the same time, CDFIs empower communities to address the structural barriers that exclude them from shared prosperity. Investors can support the important work of CDFIs by purchasing their notes. CDFI investments provide choices that enable investors to align their impact goals with their financial goals. As investment partners, CDFIs are well-versed in achieving, measuring, and reporting impact.

InspereX distributes notes from three CDFIs

	CAPITAL IMPACT	CENTURY	LSC			
	Capital Impact Partners helps build inclusive and equitable communities by providing people access to the capital and opportunities they deserve.	Century finances quality, affordable housing throughout California to provide dignified homes, healthy and hopeful futures, and economic independence to individuals, families, veterans, and seniors.	Together with residents and partners, LISC forges resilient and inclusive communities of opportunity across America—great places to live, work, visit, do business, and raise families.			
Sectors served	45% Housing 22% Healthcare 19% Education 14% Community development	100% Housing	48% Housing 28% Community & economic development 16% Education 5% Health 3% Microenterprises, small- and medium-sized businesses			
Type of CDFI	Community development loan fund	Community development loan fund	Community development loan fund			
Year founded	1982	1995	1979			
Geography served	National; Top states: California, Michigan, Washington DC, New York, Texas	California	National; Top states: California, New York, Washington DC, New Jersey, Illinois			
Loan portfolio	\$499.6 million	\$401.1 million	\$688.6 million			
Cumulative community investment	\$3.1 billion	\$2.7 billion	\$4.1 billion - parent only			
Data as of	12/31/2023	12/31/2023	12/31/2023			



CDFIs aim to make progress toward the United Nations Sustainable Development Goals (SDGs). These goals are the blueprint to achieve a better and more sustainable future for all.

	Capital Impact Partners	Century	LISC		Capital Impact Partners	Century	LISC		Capital Impact Partners	Century	LISC
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2 ZERO HUNGER	-			8 DECENT WORK AND ECONOMIC GROWTH				14 UFE BELOW WATER			
3 GOOD HEALTH AND WELL-BEING	-			9 NOUSTRY, INNOVATION AND INFRASTRUCTURE				15 LIFE ON LAND			
4 QUALITY EDUCATION	-		-	10 REDUCED NEQUALITIES			-	16 PEACE, JUSTICE AND STRONG INSTITUTIONS			
5 GENDER EQUALITY								17 PARTNERSHIPS FOR THE GOALS			
6 CLEAN WATER AND SANITATION				12 RESPONSIBLE CONSUMPTION AND PRODUCTION							

(DF)

Mission-driven investors supporting CDFIs have an opportunity to foster positive social change while achieving financial returns. Ask your financial advisor about the risks and suitability of CDFI investments for your portfolio.

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