

# Impact Customization Form

**!** Please use this form to select your impact customization and email it to [targeting@ccminvests.com](mailto:targeting@ccminvests.com). If you would like to share any additional information regarding your customization options, please include details in the email.

Date *mm/dd/yyyy* \_\_\_\_\_ Date of Investment *If applicable, mm/dd/yyyy* \_\_\_\_\_ Funding Amount \$ \_\_\_\_\_

☐ I prefer CCM not to use my organization's name in marketing materials (i.e. presentations, reports, press releases).

## Advisor Information

*If applicable*

Advisor Name \_\_\_\_\_

Phone \_\_\_\_\_

Firm \_\_\_\_\_

Email \_\_\_\_\_

## Client Information

Client Name \_\_\_\_\_

Phone \_\_\_\_\_

Firm \_\_\_\_\_

Email \_\_\_\_\_

## Trade Platform

Platform Name *(e.g. Charles Schwab) if applicable* \_\_\_\_\_

## Targeting Options

Investments can be customized to different geographies, impact themes, or initiatives in increments of \$500,000. For example, if you made an investment of \$1 million, you could select \$500,000 targeted by geography and \$500,000 targeted by impact themes. Please mark your customization and dollar amount selections below. If you have any questions, please email [targeting@ccminvests.com](mailto:targeting@ccminvests.com).

### Option 1: By Geography

Targeted Amount

\$

- ☐ State Specific *Please list state(s)* \_\_\_\_\_
- ☐ County Specific *Please list county/counties* \_\_\_\_\_

### Option 2: By Impact Themes

Targeted Amount

\$

Please note: the options listed below are general themes. If there is a specific theme you would like to target your investments to that is not listed below, we will be happy to discuss customization options. **Full descriptions for all impact themes is available [here](#).**

Affordable Health and Rehabilitation Care



Healthy Communities



Affordable Housing



Human Empowerment



Arts, Culture, and the Creative Economy



Minority Advancement



Disaster Recovery, Resilience, and Remediation



Neighborhood Revitalization



Economic Inclusion



Poverty Alleviation



Education and Childcare



Rural Community Development



Enterprise Development and Jobs



Seniors, Veterans, and the Disabled



Environmental Sustainability



Sustainable Agriculture



Gender Lens



Transit-Oriented Development



### Option 3: By Initiative

Targeted Amount

\$

- ☐ COVID-19 Initiative ☐ Minority CARES Initiative