

# 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* \_\_\_\_\_

## CCM Relationship Manager

CCM RM Name *(If unsure, please list n/a)* \_\_\_\_\_

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	 Affordable Housing	 Arts, Culture, and the Creative Economy	 Disaster Recovery, Resilience, and Remediation	 Economic Inclusion	 Education and Childcare	 Enterprise Development and Jobs	 Environmental Sustainability	 Gender Lens
 Healthy Communities	 Human Empowerment	 Minority Advancement	 Neighborhood Revitalization	 Poverty Alleviation	 Rural Community Development	 Seniors, Veterans, and the Disabled	 Sustainable Agriculture	 Transit-Oriented Development

### Option 3: By Initiative

Targeted Amount \$ \_\_\_\_\_

- COVID-19 Initiative
- Minority CARES Initiative