

Impact Customization Form

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

_____ \$ _____
Funding Date *If applicable, mm/dd/yyyy* Funding Amount

CCM can use my organization's name in marketing materials? _____
Please choose a yes/no response from the dropdown. If nothing is selected, we'll assume you're okay with us using your name in our marketing materials.

Trade Platform

_____ *Platform Name if applicable* _____ *if Other please provide platform name*

Advisor

If applicable

_____ Advisor Name _____ Phone _____

_____ Firm _____ Email _____

Client

_____ Primary Client Contact Name _____ Phone _____

_____ Firm _____ Email _____

_____ City _____ State _____

Client Type

- | | | | |
|----------------------|---------------------|------------|-------------------|
| Bank | Endowment | Healthcare | Non-Profit |
| Community Foundation | Family Trust/Office | Individual | Public/Government |
| Corporate | Foundation | Insurance | Religious |
| | | | Other _____ |

Client Reporting (Reports will be sent to the contacts checked off.)

Report	Primary Client Contact	Advisor
Quarterly Impact Report		

Please select one of the three options below for customizable impact. The minimum is \$1,000,000. Please mark your customization and dollar amount selections below. If you have any questions, please email 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



Education and Childcare



Enterprise Development and Jobs



Environmental Sustainability



Gender Lens



Human Empowerment



Minority Advancement



Poverty Alleviation



Rural Community Development



Seniors, Veterans, and People with Disabilities



Sustainable Communities



Option 3: By Initiative

Targeted Amount \$

- Minority CARES
- First-Time Homebuyer

Please share any additional information regarding your customization in this section: