

# 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

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](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](#).**

<b>Affordable Health and Rehabilitation Care</b> 	<b>Affordable Housing</b> 	<b>Arts, Culture, and the Creative Economy</b> 	<b>Disaster Recovery, Resilience, and Remediation</b> 	<b>Education and Childcare</b> 	<b>Enterprise Development and Jobs</b> 	<b>Environmental Sustainability</b> 
<b>Gender Lens</b> 	<b>Human Empowerment</b> 	<b>Minority Advancement</b> 	<b>Poverty Alleviation</b> 	<b>Rural Community Development</b> 	<b>Seniors, Veterans, and People with Disabilities</b> 	<b>Sustainable Communities</b> 

### Option 3: By Initiative

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

- Minority CARES
- First-Time Homebuyer

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