

Building our Small Business Network Together – MALC April 2019

Laura Leal Estrada
Market Manager

DREAM IT. FUND IT.

LiftFund

LiftFund.com

Overview

- LiftFund: Who we Are
- Leader in the Industry
- Borrower Profile and Support
- The Power of Capital for Small Business
- Our Phases and Processes
- Building a Partnership of Trust
- Next Steps

Who We Are

Celebrating 25 years in business: the largest non-profit alternative (CDFI) lender in the United States, servicing 13 states.

LiftFund provides small business loans and business support services to entrepreneurs unable to receive funding from traditional sources.

- ***OUR SERVICES INCLUDE***
- Business loans up to \$500,000
- Business and financial education
- Identifying opportunities for business growth
- Exceptional customer service and support

LiftFund

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LiftFund a Leader in the Industry

- AERIS rating for CDFI Investments:
 - Impact Performance Rating: AAA
 - Financial Strength and Performance Rating: 3
- Charity Navigator: 4 Stars (highest rating)
 - 6 years in a row
- Clean financial audits
- A philanthropic loan fund is being developed whereby 100% of Donations directly benefit our loan programs for our borrowers

Our Borrower Profile and Support

LiftFund Provides

- Loans from \$500 up to \$500,000
- Business and financial support services
- Strategic partner organization referrals

LiftFund Supports

- All industries, including restaurant, trucking and construction
- Start ups
- Limited collateral

Borrower Profile

- 78% minority
- 36% startup
- 33% women
- 10% veteran

Our Record Since 1994

- 20,900 clients
- \$303M in loans
- 13 state footprint



The Power of Capital & Small Business

LiftFund



In 2018, LiftFund supported small businesses with \$48 million in capital



We provided a total of 1,141 loans

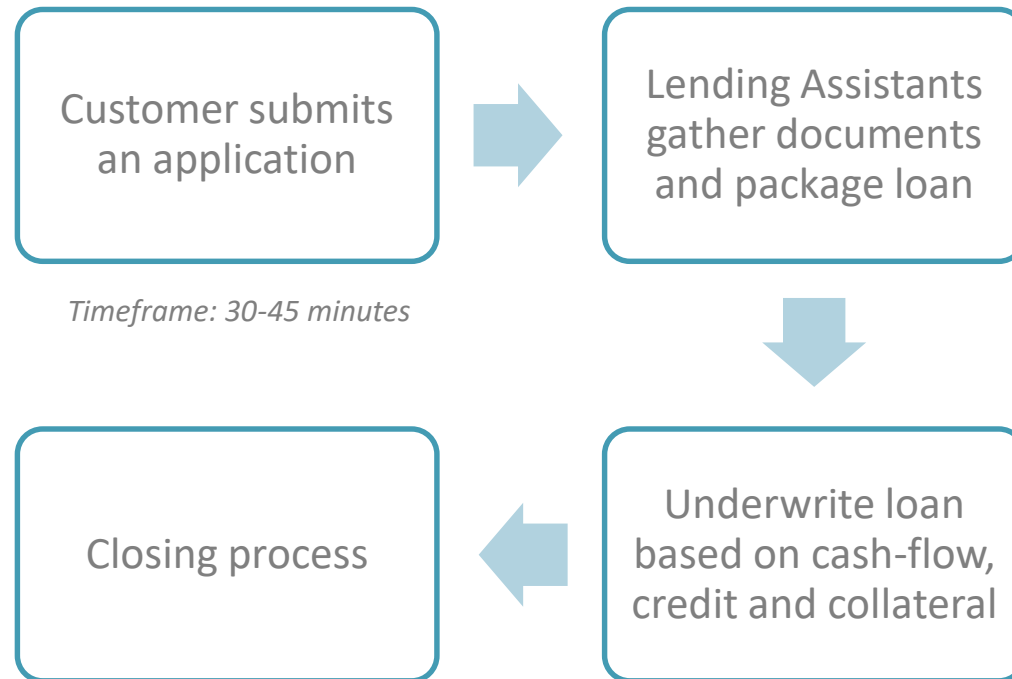


Our clients created 2,410 jobs and retained 3,285



For every \$1 LiftFund lends \$13.91 is generated in economic activity by our borrowers

Our Phases and Processes



Our lending process might take 5 to 30 business days depending on the loan amount and documents requested.

Building a Partnership of Trust

- Customer service & retention
- Depository relationship
- CRA credits
- Build a new customer pipeline



Next Steps

- Make LiftFund your referral partner
- Connect recently denied clients with LiftFund
- Keep LiftFund in mind as you visit with business owners



Let's keep in touch!

Laura Leal Estrada

361-834-8428

lestrada@liftfund.com OR
info@liftfund.com

www.liftfund.com

888.215.2373

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