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Inclusiv Network Town Hall Series: S05E07

September 10, 2024

Today's Agenda

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Today's Agenda

- **Welcoming Remarks**
- **Policy Update**
- **Inclusiv Lending Overview**
 - Inclusiv Lending Team
- **Upcoming Events**
- **Audience Discussion**

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Greenhouse Gas Reduction Fund Roundup

Find out how Inclusiv is helping member credit unions understand GGRF



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2023 Annual
Report!



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Welcome!

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Policy Update

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Inclusiv Lending

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Inclusiv Lending Team

Rosa Franco - Vice President of Lending

Bob Mundy – Director of Mortgage Operations

Jonathan Rosado – Small Business Lending Development Officer

Nicole Lanzaro – Loan Participations Marketplace



/ inclusiv / 2024 – 2026 Strategic Plan

Our Priorities

Inclusiv's mission is to help low- and moderate-income people and communities achieve financial independence through credit unions. Our vision in developing this strategic plan is to foster an equitable, inclusive cooperative financial system to build an economy in which people who have been systemically excluded benefit from quality housing, better jobs, stronger businesses, and opportunities to build wealth that remains and is reinvested in resilient, climate-prepared communities.

Over the coming years, we will focus on four priorities that are key to achieving our mission and bringing our strategic plan vision to life.



Financial Inclusion

Credit unions are strengthened and supported to reach and serve underserved consumers with products and services that build greater financial security and advance their financial goals.



Home Ownership

Credit unions deploy at scale equitable solutions for affordable and cooperative homeownership opportunities that support thriving communities and narrow the racial wealth gap.



Small Business

Credit union small business lenders have the resources needed to spur creation of quality jobs through entrepreneurship and worker ownership.



Clean Energy

Credit unions are fully funded and trained to ensure all communities can access the clean energy revolution, realize consumer savings, and frontline and historically redlined communities are resilient to climate change.

Program Mission

We serve our Inclusiv members with sustainable, relevant, and effective lending solutions

Vision

Enable community development credit unions (CDCUs) to scale their business lending in the communities they serve positioning them as key stakeholders in their Local Ecosystem.

Lending Program - Goal

Increase the volume of transacted loans:

- Mortgage loans (ITIN included): \$200 M
- Small Business loans: \$60 M
- Green loans: \$50 M

-Over a three- year period

- Through our network

Lending Program - Approach

- ✓ Training and Technical Assistance
- ✓ Credit enhancement
- ✓ Loan processing support
- ✓ Secondary Market/ Loan Participations
- ✓ Advocacy and Representativity

Bob Mundy

Director of Mortgage Operations

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Jonathan Rosado

Small Business Lending Development
Officer

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Nicole Lanzaro
Loan Participations Officer

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Upcoming Events

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Upcoming Events

/ inclusiv / CU ops & compliance



Inclusiv/CU Ops & Compliance Office Hours

An opportunity to discuss your Operations and Compliance questions with Inclusiv's experts.

Every third Tuesday of the month, 1pm – 3pm ET

To register:

<https://us02web.zoom.us/meeting/register/tZUlf-yuqj4pH9VUuRW0YIP3X1DpONR0AaKe>

Upcoming Events



Inclusiv CDFI Certification Office Hours

Wednesday afternoons at 3pm ET

To register for the series:

<https://us02web.zoom.us/meeting/register/tZUkceyuqzwwGtbpPQq4RidF3cH1ZwaJPqJy#/registration>

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Upcoming Events



Inclusiv Network Town Hall series

Tuesday, October 8th, 2024 at 1:15pm ET

To register for the series:

https://us02web.zoom.us/webinar/register/WN_2jb18kqaQmWk3dGudEaxjA

Audience Discussion

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Thank you!

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