

Community Updates

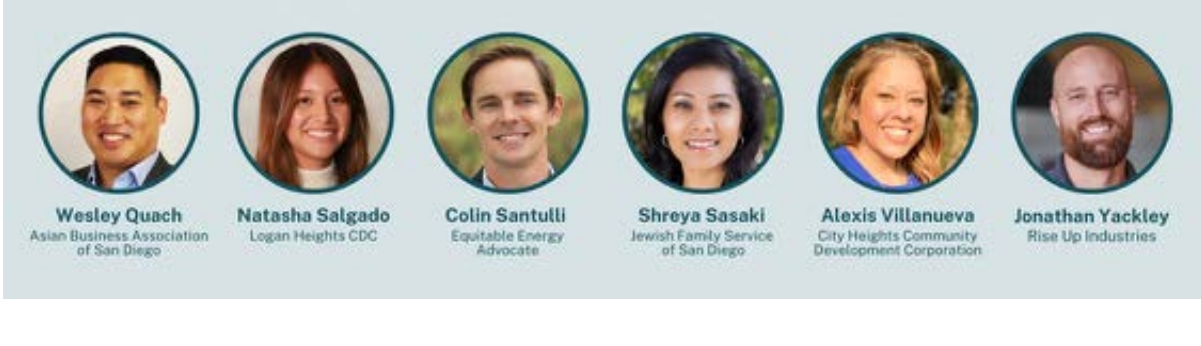


*|IFNOT:ARCHIVE_PAGE|**|IF:FNAME|*Dear *|FNAME|*,
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This year has started off with strange weather (certainly here in California) and many disheartening reports of violence and discord, but we still believe that centering community in finance can help change those trajectories. I was on the road this week talking about that intersection at the [California Strategic Growth Council Catalyst conference](#).

My talking points were rooted in lessons learned from our team's busy end of the year. Not only did we gather for an in-person retreat and take a weeklong holiday break, but **our team closed 15 deals across a variety of active strategies!** Meet a couple of the newest portfolio companies below. Our not-so-secret sauce to getting deals out the door and reconnecting capital with community has two key ingredients:

1. **Growing our intentionally diverse team.** You may have seen that we seem to be hiring. All. The. Time. It is true that we are still growing our team to bring big, bold initiatives to life. We are currently seeking a **director of real estate asset management** and a **real estate development project manager** for **CARE—our child care REIT**, as well as a **senior analyst** to strengthen our data and insights.
2. **Community representation.** Last year we piloted an advisory committee for the Advance Strategy—our house brand fund supporting San Diego—to incorporate community voice in our approach. We now recommend *all* funds put an advisory committee in place alongside an investment committee. And we are thrilled to welcome new members to our **Advance Advisory Committee**:



- **Juan Carlos Hernandez**, CEO, [California Southern SBDC](#)
- **Bill Ponder**, Director of Programs and Engagement, [Burnham Center](#)
- **Colin Santulli**, equitable energy advocate
- **Jonathan Yackley**, Deputy Executive Director/Vice President, [Rise Up Industries](#)

Huge thanks to these community and business leaders, and champions like you.

Wishing you a happy and healthy 2023,

Lauren

Lauren Grattan
Co-founder & Chief Community Officer

P.S. ICYMI, our Senior Director of Care & Education **Laura Kohn** spoke at the [39th Annual San Diego County Economic Roundtable](#), a forum where experts forecast what's to come for the region. Laura was on a panel discussing housing, child care, and business issues. As she shared, "Affordable housing includes families and must work alongside child care."

Welcome New Portfolio Companies

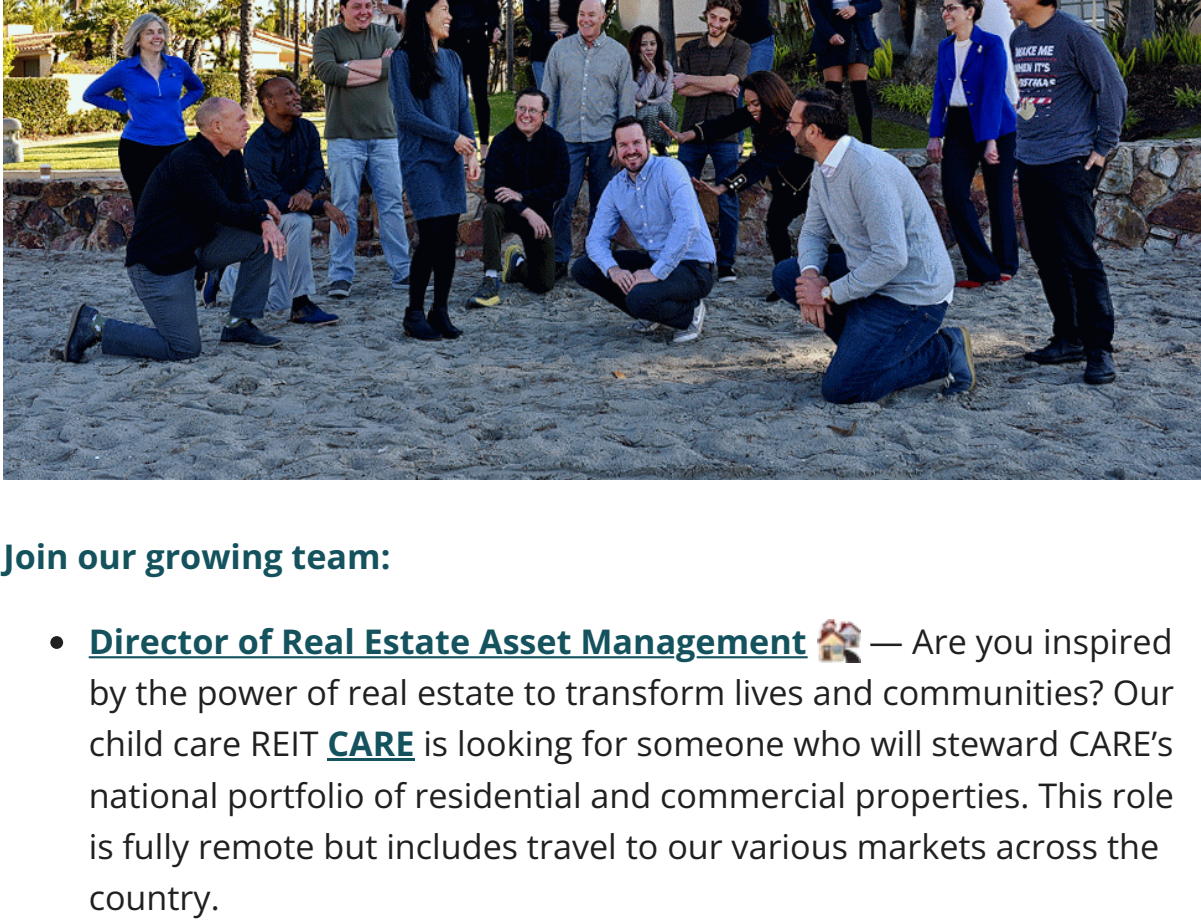


Since **RDA Consulting's** beginnings, the group has promoted social justice, worked to improve health outcomes, integrated the delivery of health and human services, and addressed systemic problems that primarily affect poor communities. The team will get to do that as stakeholders of an [employee ownership trust](#).



Psoas Massage + Bodywork, LLC's current owner, Jennifer Lightstone, is exploring conversion to employee ownership as she retires. Jennifer hopes that a transition to employee ownership will allow therapists to be rewarded for their commitment to their work and community.

We're Hiring!



Join our growing team:

- **Director of Real Estate Asset Management** 🏡 — Are you inspired by the power of real estate to transform lives and communities? Our child care REIT **CARE** is looking for someone who will steward CARE's national portfolio of residential and commercial properties. This role is fully remote but includes travel to our various markets across the country.
- **Real Estate Development Project Manager** 🏠 — Also part of our child care REIT **CARE**, we are seeking someone with an entrepreneurial spirit, hungry to be part of building and leading something unique, novel, and socially impactful to be the market manager for operations in Clark County. This role is fully remote but includes travel in and around the Las Vegas region.
- **Senior Analyst** 📊 — Spreadsheet nerds of the world unite for good! In all seriousness, we have a bunch of fascinating data and are seeking someone to help organize it to inform our actions.

Help us spread the word!

👉 I KNOW A GREAT FIT FOR MISSION DRIVEN FINANCE

Loans for Small Businesses & Nonprofits

We invest in impactful small businesses and nonprofits, including—but not limited to—those supporting immigrants, refugees, and survivors of trafficking, businesses transitioning to an employee-ownership model, and entities advancing regenerative agriculture.

- Options for loans or revenue-based financing
- Islamic financing available
- Flexible payment schedules
- No personal credit scores required
- No personal guarantees required

👉 I WANT TO GROW MY BUSINESS

👉 I WANT TO MEET OTHER IMPACTFUL COMPANIES

Do you know any tenacious small businesses and nonprofits in California that are doing great things but need capital?

We've got good news for you: As a way to thank the community champions who introduce us to impact-driven organizations that we haven't met yet, we want to share not only our gratitude—but also a **referral bonus of \$250** (upon disbursement of capital to the referred borrower).

👉 I WANT TO REFER A BORROWER & EARN \$250

What We're Reading

Portfolio updates:

- [San Diego Nonprofit creating diversity in tech industry](#) [ABC 10 News San Diego]
- [Someone San Diego Should Know: Mike Roberts](#) [The San Diego Union-Tribune]
- [Finally, Let's Talk More About Ebikes](#) [Next City]
- [BJC Makes Anchor Investment in WEPower Capital](#)

👉 I WANT TO NERD OUT SOME MORE 📖

Did Someone Smart Forward This to You?

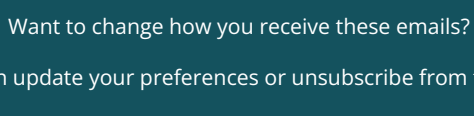
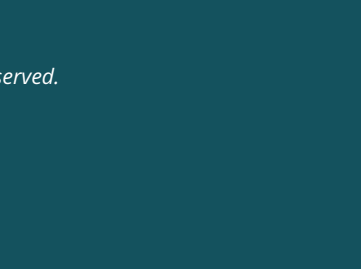
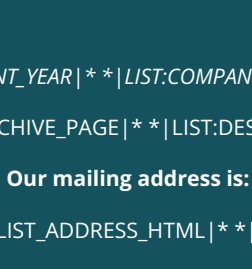
Get our newsletter in your inbox each month. Or find us on social media and stay connected to what's happening in the world of inclusive finance.

I DON'T WANT TO MISS OUT

Do you know any business owners, entrepreneurs, investors, financial planners, Registered Investment Advisors, nonprofit and philanthropy leaders, and anyone else interested in impact-based lending and investments?

Please share this email with them or [connect them with us](#).

I WANT TO FORWARD THIS & SHARE THE GOODIES



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