

# Community Updates



\*|IFNOT:ARCHIVE\_PAGE|\*\*|IF:FNAME|\*Dear \*|FNAME|\*,

\*|END:IF|\*\*|END:IF|\*

We're big fans of reflecting on the year as it comes to a close. 2024 has been yet another rollercoaster, but we'd love to share some collective "Llama Wins" with you.

# \$100+ MIL IN ASSETS INTO THE COMMUNITY

Since our founding as of November 30, 2023

This fall, we reached a landmark moment, **flowing over \$100 million in assets into the community since our founding.**

As of November 30, 2023, we:

- Added nearly **\$40 million** in assets into community
- Closed **61 transactions across 11 strategies** designed to support underfunded communities in building an inclusive economy
- **Purchased eight homes** for child care through [Care Access Real Estate \(CARE\)](#)
- Closed out the **San Diego COVID-19 Nonprofit Loan Program—\$5.2 million disbursed to 26 nonprofits** across 27 loans that have now matured, *with a loss ratio of less than 0.04%*
- Welcomed **35 values-aligned small businesses and nonprofits** to the portfolio
- Had **115 hours of discovery and check-in calls** with current portfolio companies
- **Hired 13 people** (and still [hiring!](#))
- **Spoke at 29 conferences and events** across the country and virtually
- Appeared in the [media 24 times](#)



Just last week, **Stephen Nunes** and I traveled to snowy Santa Fe to meet with partners on a new place-based strategy, for which we got unanimous approval for an **anchor \$10 million commitment!** More to come.

On January 10, I'll be chatting with some of my favorite people in the field—[Jaime Gloshey](#) of Common Future, [Betty Francisco](#) of Boston Impact Initiative, and [Stephanie Grippe](#) of Impact Finance Center—about cultivating diversity in leadership, supporting emerging managers, building inclusive ecosystems, and success stories and best practices. [Join us.](#)



As a way to encourage collective rest across the team after a busy year of milestones and accomplishments, Mission Driven Finance is closed December 25, 2023 through January 1, 2024. Stay tuned for more big updates in the new year.

Wishing you a safe and happy winter solstice,

Lauren Grattan

Co-founder & Chief Community Officer

P.S. We crowdsourced some ways our team is taking care of ourselves this winter:

- Hot water all day
- Spicy foods
- Canceling plans
- Irish sea moss
- Elderberry syrup
- CoQ10 + vitamin D + magnesium before bed
- Oranges to keep the scurvy away

## We're Hiring



Join our growing team or help us spread the word:

- **Senior 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 Access Real Estate (CARE) is looking for someone who will steward its national portfolio of residential and commercial properties from closing through renovation and occupancy to disposition. This role is fully remote but includes travel to various markets across the country.
- **Manager of Fund Operations** — Are you resourceful, hyper-organized, and can work within a wide breadth of systems and tasks that keep our fund, investor, and borrow operations running smoothly? Do you love to lead and are you excited about helping others grow? This person would be responsible for the day-to-day operations of our investment products across all asset classes and provide supervision to the fund operations team.

[👉 I KNOW A GREAT FIT FOR MISSION DRIVEN FINANCE](#)

## Portfolio & Partner Updates

[Impact\(ed\): Driving foundation endowments toward social justice](#)

(podcast)

[ImpactAlpha]

[Employee ownership: Primed to scale](#)

[New Private Markets]

[Interview with Fibers Fund Co-Managing Directors Sarah Kelley and Teju Adisa-Farrar](#)

[Integrated Capital Investing: Transformative 25]

[Deepening Community Across WES' Mission Investing Partners to Advance Collective Impact and Action](#)

[World Education Services]

[Financing transitions to employee ownership delivers wins for workers — and investors](#)

[ImpactAlpha]

[San Diego Habitat for Humanity Announces Expanded Investment from Mission Driven Finance](#)

[San Diego Habitat for Humanity + Mission Driven Finance]

[These 11 Vegan Restaurants Will Cater Your Christmas Dinner](#)

[VegNews]

[The Food Hit List: December 2023](#)

[San Diego Magazine]

## Did someone smart forward this to you?

Get your own copy and be that someone smart for someone else.

[SIGN ME UP](#)

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.](#)

Engage with us on social media



mission driven finance

California Finance Lenders License #60DB0-72347

Copyright © \*|CURRENT\_YEAR|\* \*|LIST:COMPANY|\*. All rights reserved.

Our mailing address is:

\*|HTML:LIST\_ADDRESS\_HTML|\* \*|END:IF|\*

Want to change how you receive these emails?

You can update your preferences or unsubscribe from this list.

This communication is for informational purposes only and does not constitute an offer to sell, a solicitation to buy, or a recommendation for any security, nor does it constitute an offer to provide investment advisory or other services. No reference to any specific security constitutes a recommendation to buy, sell or hold that security or any other security. Nothing in this communication shall be considered a solicitation or offer to buy or sell any security, future, option or other financial instrument or to offer or provide any investment advice or service to any person in any jurisdiction. Nothing contained in this communication constitutes investment advice or offers any opinion with respect to the suitability of any security, and the views expressed in this communication should not be taken as advice to buy, sell or hold any security.