INCLUSIV SOUTHERN EQUITY FUND

HIGH-IMPACT CAPITAL INVESTMENTS IN CDCUS TARGETING POVERTY & RACIAL WEALTH GAP

COMMUNITY REINVESTMENT AND IMPACT:

- Support expansion of community impact and services to underserved communities
  - Innovate and scale loan products and development services designed for low-income and marginalized communities
  - Increase market engagement of unbanked/underbanked communities
  - Strengthen and/or develop community development initiatives into larger business plan
- Catalyst for financial growth and financial inclusion
At Inclusiv, we believe that true financial inclusion and empowerment is a fundamental right. We dedicate ourselves to closing the gaps and removing barriers to financial opportunities for people living in distressed and underserved communities.

Inclusiv is a certified CDFI intermediary that transforms local progress into lasting national change. We provide capital, make connections, build capacity, develop innovative products and services and advocate for our member community development credit unions (CDCUs).

Inclusiv members serve 10 million residents of low-income urban, rural and reservation-based communities across the US and hold over $112 billion in community controlled assets. Founded in 1974, Inclusiv is headquartered in New York, NY, with offices in Madison, WI and Atlanta, GA.

The $45 million Inclusiv Southern Equity Fund invests capital in credit unions serving low-income and communities of color in 17 states, including Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia and West Virginia.

The Fund is designed to promote economic mobility among low-wealth and underserved communities, to preserve and build diversity in community owned and controlled financial services, and to increase the impact of scalable institutions throughout the American South.

The Fund makes investments of up to $5 million in secondary capital loans to high-impact community development credit unions (CDCUs).

The Kresge Foundation, a private, national foundation that builds and strengthens pathways to opportunity for low-income people in America’s cities, has joined Inclusiv as a limited partner of the Fund. National Cooperative Bank, Bank of America, MetLife, and Prudential Financial, Inc. are investors in the Inclusiv Southern Equity Fund.

THE OPPORTUNITY

- 17 STATES
- 1,111 CREDIT UNION BRANCH LOCATIONS
- $1.88 BILLION IN ASSETS
- 6.8 MILLION MEMBERS SERVED

ABOUT THE INCLUSIV SOUTHERN EQUITY FUND

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