



CDFI Coalition Annual Meeting

March 19th, 2026



Proposed Agenda



**Annual Membership Meeting Agenda
Washington Plaza Hotel
March 19, 2026
8:00 am**

- Call to Order
- Approval of Minutes from Previous Annual Meeting
- Nominating Committee Report
- New Member Welcome
- Other Business



Previous Minutes

Annual Business Meeting Minutes March 14, 2025

Call to Order

Hank Helton called the meeting to order at 8:06am.

Ceyl Prinster moved to approve the previous minutes, Laura Buxbaum seconded, and the motion passed unanimously.

Hank welcomed the 18 new members of the Coalition and emphasized the importance of membership for the Coalition and telling stories to gain support for CDFIs.

Hank thanked Laura Buxbaum and Yan Jiang for their service to the board as their term is expiring.

Nominating Committee Report

Hank began the nominating committee report. There were 17 people interested in joining the board, which is the most interest the Coalition has received. The executive committee and board decided to expand the board by two with 20 board members, 4 new.

The new members are:

- Amber Codoba, AZ CDFI
- Ben Wright, MoFi
- Dana Lieberman, IFF
- James Bason, TruFund Financial Services

Legislative Report

Bob gave the legislative update, he reported that the Senate will probably pass the CR this afternoon, mostly with Republican votes and no filibuster. Will be passed by the end of the day there should be no shut down and the CDFI Fund will continue to operate.

Pravina Raghavan will be at the conference, Alexandria Smith will not. This is a chance to discuss with Pravina, particularly since January to talk about policy issues. Some received certifications yesterday so discussing the schedule and time frame for certification is important and the plans that the fund has to go forward now that they have an appropriation.

He thanked the Board for their help and welcomed the new members. He reported that the nomination of Michael Faulkender will be released out of the finance committee today and will be on the floor in April. Once confirmed, the coalition will try to get a time to sit down with him and talk about the importance of the CDFI fund.

He provided a reminder about the Campaign call April 9th and stressed the importance of scheduling site visits with members of Congress during their recesses.

Hank Helton adjourned the meeting at 8:20am.

Attendees – 2025 CDFI Institute Annual Meeting

<i>Name</i>	<i>Organization</i>
Katey Forth	Cinnaire
Liza Fleming	The Genesis Fund
Jenny Rottmann	The Genesis Fund
Hank Helton	Pathway Lending
Stephanie Paull	Lucas Home Loans Inc
E. Hamil Douglas	Harlem Entrepreneurial Fund
Brenda McDaniels	Kentucky Highlands Investment
Jeannine Jacokes	CDBA
Peter Hille	Mountain Association
Steve Saltzman	New Hampshire Community Loan Fund
Angela Belcher	The Housing Fund
Kirby Burkholder	IFF
Jim Reift	NEF
Lynne Wallace	Neighborworks America
Doug Sessions	Neighborworks America
Richard Bird	Pathway Lending
Brian Hutchinson	Community Ventures Corporation
Kevin McDonnell	Three Roots Capital
Keith Hickey	Three Roots Capital
En Jung Kim	Chase
Dana Lieberman	IFF
Laura Buxbaum	CEI
Shawn Wellnitz	Entrepreneur Fund
Matthew Roth	CRF, USA
Alexis Aishman	CRF, USA
Katie Rasmus	Grow SD
Betsy Biemann	CEI
Janie Bright	Civic LGFCU
Amanda Blondeau	Northern Initiatives
Blair Duncan	UMEZ Dev Corp
Gina Bolden-Rivera	UMEZ Dev Corp
Patrice Frey	Repurpose Capital
Ben Wright	MoFi
Kerwin Tesdell	CDVCA
John Holdsclaw	Rochdale Capital
Joey Zeldin	CDBA
Brian Blake	CDBA
Agnes Ubalde	PNC Bank
Storm Taliaferrow	NALCAB
April Demendonca	NALCAB

James Bason	TruFund Financial Services
Richard Moore	African American Alliance of CDFI CEOs
Matthew Lewis	Four Directions Dev. Corp
Jose Rivera	Leviticus Fund
Ceyl Prinster	Colorado Enterprise Fund
Clifford Rosenthal	Arden & Rosenthal
Emily Freedman	Capital One
Caryn Legas	Neighborgood Partners
Kim Holloway	Freddie Mac
Felicia Ravelomanantsoa	African Development Center
Robin Gabbard	Mountain Association
Amber Cordoba	Prestamos CDFI
Abby Bronson	NH Community Loan Fund
Marten Jenkins	PCAP
Robert Deaning	The Center for Rural Health Development



Nominating Committee Report

Nominating Committee Report, February 4, 2026

Governance & Nominating Committee: Hank Helton (Pathway Lending), Katey Forth (Cinnaire), Keith Bisson (CEI), Janie Bright (Civic Federal Credit Union), Jeannine Jacokes (CDBA), John Holdsclaw (Rochdale Capital)

The committee met on February 4, 2026, with all members present to consider the nominations. There were thirteen total candidates that were considered.

Bob Rapoza clarified that there was only one open At-Large Board seat, not two. The committee began discussion on the proposed nominees:

- Bernel Hall, New Jersey Community Capital
- Betsy Biemann, CEI
- Christopher Lewis, American Bankers Association
- David Beck, Self-Help
- James Caudill, Redbud Financial Alternatives Inc.
- James Hunter, New Orleans Firemen's Credit Union
- Jason Friedman, Friedman Associates
- Kathryn Dunn, WWBIC
- Mark Kudlowitz, LISC
- Pete Upton, Native CDFI Network
- Pravina Raghavan, Locus
- Ron Brooks, River City Capital
- Terri Preston, Prestamos CDFI

Keith made a motion to nominate Pete Upton for the vacant At-Large seat. Jeannine seconded the motion.

The motion passed unanimously.

On Friday March 6th the Board approved the nomination of Pete Upton to join the Board of Directors by a vote of 14-0.

See below for further information on Pete Upton.



Pete Upton

CEO/Chairperson | Native CDFI Network

In addition to serving as NCN's CEO/Chairperson, Pete Upton (Ponca Tribe of Nebraska) is the Executive Director of Native360 Loan Fund, a certified Native Community Development Financial Institution that focuses on entrepreneurship and financial literacy development for Native Americans. Mr. Upton has been involved with the Native CDFI Network since it was a grassroots movement. From 2011-2012, he served on the steering committee that was instrumental in the Native CDFI Network's initial organizational development steps. In 2012, Mr. Upton became a founding board member and

served as the Chairperson for the Peer Learning Committee.

In 2023, Upton led the Native CDFI Network in a groundbreaking effort to catalyze clean energy infrastructure development in Native communities nationwide. The Native CDFI Network, in a historic bid, submitted a comprehensive application to the Clean Communities Investment Accelerator, seeking several hundred million dollars to finance clean energy projects in Native communities through a collaborative effort involving 63 certified Native community development financial institutions and other qualified lenders across all 10 EPA regions.

Serving as Executive Director of Native360 Loan Fund since 2011, Mr. Upton has built the organization from its start-up phase into a successful lending organization that continues to experience growth while increasing its community impact. As Native360 serves Native communities in three states, Mr. Upton understands the challenges of serving both rural and urban areas in various jurisdictions. He values strong networks and cultivates partnerships to deliver technical assistance throughout a vast service area. Mr. Upton is a powerful advocate for equal access to capital.



**New Member
Welcome**



The Coalition welcomes our 24 New Members¹:

Civic Communities (CA)
Clarity Impact Finance, Inc. (NY)
Dakota Resources (SD)
Entrepreneur Works Fund (PA)
Fabiani Advisors (DC)
First Children's Finance (MI)
Grameen America, Inc. (NY)
Great Falls Development Authority, Inc. (MT)
Greater Minnesota Housing Fund (MN)
Knoxville Area Urban League (TN)
Leviticus 25:24 Alternative Fund, Inc. (NY)
LUCAS Home Loans, LLC (MD)
Mercy Community Capital (CO)
National Housing Conference (DC)
Native CDFI Network (NE)
Neighborhood Community Development Fund (PA)
Pennsylvania CDFI Network (PA)
RePurpose Capital (WA)
Southeast Kentucky Economic Development Corporation (KY)
Southwest Minnesota Community Capital (MN)
The Axiom Advancement Corporation (PA)
The Catalytic Fund (KY)
Upper Manhattan Empowerment Zone Development Corporation (NY)

¹ Members shown joined after 10/2/2025, when billing began for the 2026 year