



Uplift America Fund – Information Overview Form

Name of CDFI/Re-Lender	
Year Formed	
Office(s) Location	
Application submitted to FDIC bank for CFRP guarantee [bank name; submission date]	
Rural Communities Served	
Number of Full-Time Staff, Number of Lending-Related Staff	
Current Year Operating Budget	
Last Year Operating Budget	
USDA CFRP Loan Amount Requested	
Number of Loan Originations Expected from CFRP Deployment	
Key Contact Information (name, phone, email)	

Attachments

1. Application templates (in Excel format as provided)
2. Three years of financial audits, with any management letters
3. Internally prepared financial statements for most recent quarter end, showing comparison of budget to actual
4. Budget for current fiscal year and projections for next three fiscal years
5. Organization chart with start date of each employee
6. Lending manual, including parameters for approving/declining loans, approval authorities, risk rating system and procedures for servicing of loans (collections)
7. Management team bios, board and loan committee lists



Uplift America Fund – Narrative Overview Form

Describe your mission. (100 words or fewer)	
Overview of rural lending (200 words or fewer) <ul style="list-style-type: none"> • When began lending in rural areas • What types of loans originated in rural areas • How much total volume lent in rural areas 	
Please describe your CDFI's existing demand for CF capital and, specifically, your pipeline of potential projects. (200 words or fewer)	
Please describe your plan to successfully deploy USDA CF capital in your rural, economically distressed market area. (No more than one page) <ul style="list-style-type: none"> • What strategies will you use? • Who will you partner with? • What will you do to increase your chance for success? 	
How much grant money are you requesting and for what purposes? (100 words or fewer)	
Specifically, how will the grant funds requested contribute to the successful deployment of USDA CFRP loan capital? (300 words or fewer)	
Who will benefit from your use of Community Facility funds over the next three years? How will they benefit? Please describe direct and indirect beneficiaries. (200 words or fewer)	
What will you do to increase the chance that low-income/low-wealth people will benefit directly and indirectly from these efforts? (200 words or fewer)	
Acknowledgement that Uplift America Fund may share any and all submitted materials with USDA, foundation partners, letter of credit underwriters or others (electronic signature of executive director)	