

BRIDGE INVESTMENT
Community Development Corporation

2015

ANNUAL REPORT

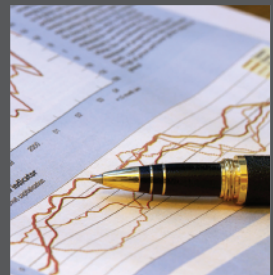
**SUPPORT
LOCAL
BUSINESSES**



**CREATE
JOBS**



**CHANGE
COMMUNITIES**



www.BridgeInvestment.org

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Bridge Investment (Bridge Investment) is a 501(c)3 national not-for-profit corporation with a particular, though not exclusive, focus on Iowa and Illinois that seeks to empower individuals, businesses, and cities through its financial programs and services to assist the emerging economic needs of communities.

SUPPORT LOCAL BUSINESSES. CREATE JOBS. CHANGE COMMUNITIES.

OUR MISSION.

Support job creation and economic growth in low-and-moderate-income communities and underserved areas by:

Providing **community-based lending and investment**;

Leveraging public and private investment for **economic and community development**;

Fostering the **creation and preservation** of low-and-moderate-income housing for low-and-moderate-income households.

OUR METHODS.

Provide Capital

To address working cash flow needs of existing or expanding businesses.

Provide Patient Capital

To entities utilizing Development Agreements for the purpose of real estate transactions.

Provide Short-term Gap Financing

To entities or municipalities seeking to assist with pre-development costs of businesses or real estate activities.

OUR MEMBERS.

Bridge Investment is currently inviting individuals, firms, and corporations to become members. All members shall contribute a minimum of \$30,000 in initial capital funding to Bridge Investment. Any person, firm or corporation that becomes a member of Bridge Investment shall be represented on its Board of Directors. The Board of Directors actively participate in key initiatives. With your investment, Bridge Investment will have the **opportunity to bring \$2.5 Million in new resources to re-invest directly into small business growth and support.**

Financial Institutions investing in Bridge Investment may be eligible for consideration of certain CRA Requirements.

As a 501c3 organization, contributions to Bridge Investment are tax deductible to the fullest extent allowed by law.

ANNUAL REPORT

- Articles of Incorporation filed and received.
- 501(c)3 status approved by IRS in less than 45 days
- \$375,000 in capital subscriptions raised.
- Website Developed at www.BridgeInvestmentCDC.org
- Informational Luncheon held in July
- Online Application developed
- Loan Policies Developed
- Contracted with Sonia Berg to assist with member relations

BOARD OF DIRECTORS

Any person, firm or corporation that becomes a member of Bridge Investment shall be represented on its Board of Directors. The Board of Directors actively participate in key initiatives.

- American Bank & Trust
- BankORION
- Bush Construction
- Development Association of Rock Island, Inc.
- Modern Woodmen Bank
- Quad City Bank & Trust
- Sauk Valley Bank
- Southeast National Bank
- US Bank

By offering loans, guidance, and resources to small and emerging businesses, Bridge Investment is looking to create community impact, emphasize projects that are in highly distressed locations, have strong community alignment, create jobs, and provide critical services to the community that spawn additional private investment.

LOOKING FORWARD...

Establish a minimum 15 member Board of Directors

Establish Executive Committee/ Loan Committee

Launch Public Relations campaign to formally announce Bridge Investments.

Convene Loan Committee to review loan applications received.

Convene Board of Directors to approve loan applications.

Prepare and submit Application to U.S. Treasury Department to become certified as a Community Development Financial Institution (CDFI).

Continue outreach and member relations activities.

SPECIAL THANK YOU

In 2015, The Business Valued Advisor Fund, LLC. became the Primary Sponsor of Bridge Investment by contributing a \$100,000 5-year loan at 0% as seed capital to launch Bridge's efforts. In addition to the loan, the Fund also provided a \$5,000 grant to assist in marketing the new national non-profit.

The Business
Valued Advisor
Fund, LLC



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