Community Development Investments (Bank Name Here)

Investment Name:

1. Does the primary purpose of this investment address at least one of the following? (Highlight in bold the item/s that apply)

Affordable housing for low- or moderate-income individuals

Community Services targeted to low- or moderate-income individuals

Promote economic development by: financing businesses or farms eligible by size per 13 DFR 121.301 or gross revenues =<\$1,000,000.

Activities that revitalize or stabilize low- or moderate-income geographies

2. This investment has not been reported or collected by an affiliate for considerate in the affiliate" CRA performance.

(Your bank name here.... has no affiliates)

3. This investment benefits the bank's assessment area(s) or a broader statewide or regional area that includes the bank's assessment areas. What area is benefited:

Assessment Area/s Served:

Census Tract/s:

- 4. If the investment benefits a broader statewide or regional area, explain how funds are allocated in the area.
- 5. Was there potential that the funds would be invested within the bank's assessment area(s) at the time the investment was initially made? (Highlight in bold the correct answer)

YES NO

6. Outstanding Balance: \$

(as of date)

Available Commitment: \$

Date of Investment: mm/dd/yy

Original Investment: \$

- 7. Describe the investment, how it addresses the community development purpose, and the results/success of the investment:
- 8. Is this investment innovative and/or flexible (highlight in bold the correct answer)

YES NO

- 9. If yes above, how was the investment innovative and/or flexible?
- 10. Provide supporting documentation or the name and phone number of the person who has the supporting documentation available for review if not below.
- 11. This worksheet was prepared by (name and phone number)

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