

Customize Your Impact

Is your investment in Florida specific to a particular location?

(*if yes, please specify)

-what city _____

-what county _____

Which initiatives would you want your investments to support?

(*Please check all that apply)

- Affordable housing (including, homeownership for low-income families)
- Children
- Distressed communities
- Education
- Environmental sustainability (includes all types of environmental sustainability such as wind farms, brownfield redevelopment, recycling, etc.)
- General community/economic development
- Healthy Communities
- Investments affiliated with religious organizations
- Job creation/training
- Neighborhood revitalization
- Senior Housing

Small business development

The Disabled

Wealth creation

Women

**Other: _____

Organization Name _____

Contact Name _____

Contact Title _____

Contact Phone Number _____

Contact Email _____

Are you currently doing any impact investing?

-yes or no _____

This questionnaire is intended to help define how you would like to make a difference with your investments. Please note that this questionnaire relates to that proportion of your portfolio that you would like to allocate to impact investing, where the risk of total loss of capital is significant.

High social impact investments are typically made in early-stage (small to medium sized businesses), unlisted companies that may be difficult to sell, especially in the early years.

An investment therefore carries a high risk of capital loss with no certainty of any financial return or of being able to access your money when you wish to do so. *This means that you should not be reliant on any capital committed to this type of investment.* If you would like advice on other aspects of your investments, please let us know.

What is most important?

**Please rank in order of importance (1 = most important, 3 = least important)

Preservation of capital _____

Financial return _____

Beneficial social/environmental impact _____

Access To Capital

Most social impact investments are hard to sell and may only be available to buy in a limited time window. This lack of liquidity is a major consideration if you foresee a need to access the capital at some point in the future.

****Please indicate the proportion of your impact investment portfolio that you can commit for the following time-frames:**

(a) Not Important – I do not foresee needing access to this money at any point in the future.

Nil Up to 10% 10-25% 25-50% 50-100%

(b) > 10 Years – I am prepared to leave the capital invested for at least 10 years.

Nil Up to 10% 10-25% 25-50% 50-100%

(c) 5-10 Years – I may need access to this money within this time-frame.

Nil Up to 10% 10-25% 25-50% 50-100%

It may also be worth thinking about the circumstances under which you may need access to this money. Please note any such circumstances below...

Scan or Send back to:

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*or just give us a call... (407) 772-1135 or (561) 596-5067