



# Advance your community

Bold visions, innovative enterprises, and great community programs deserve the opportunity to succeed. But many small businesses and nonprofits hiring, training, and serving their communities have trouble getting sufficient, affordable capital. The Advance Strategy at Mission Driven Finance is here to change that.

## Investing in your community can be a great investment.

From education that develops the whole child, to businesses creating welcoming work environments for veterans and military families to thrive, to smaller real estate developers building affordable and attainable housing, Advance borrowers create economic opportunity in the greater San Diego region to:

- **Prepare** people for success through access to health, education and housing
- **Provide** quality jobs, hire from their communities, and support employee development
- Reimagine systems and infrastructure that allow more people to **Participate** in a positive growing economy

## Your Investment Can Advance San Diego

Through 2019, Mission Driven Finance is accepting up to \$3M in the Advance Strategy from local champions like you—accredited and charitable investors that want to invest in their own backyard.\* This local commitment will transform your community, and also help unlock a \$2M investment from a national institutional investor.

### Core Class

Maturing June 2025  
4.50%

### Catalytic Class

Maturing June 2025  
3.00%

\*Offered to accredited, charitable, and institutional investors, subject to availability. Please refer to subscription documents for more information.

## Advance portfolio companies

Meet some of the leaders creating impact in their communities:



Joshua Itano  
**CareCar**  
Access to healthcare  
Quality jobs



Bethany Chaffin  
**Friends of Willow Tree**  
Access to education



Ahmed Sahid  
**Somali Family Service**  
Inclusive entrepreneurship  
Access to healthcare



Ryan Sisson  
**Moniker Group**  
Quality jobs  
Workforce development

## Advance participation

**Mission Driven Finance works with many investment avenues to make it easy to invest in your community:**

Direct Investment • IRA • Private Foundation • Family Foundation • Donor Advised Fund  
Program-Related Investment • Mission-Related Investment • Corpus

The Advance Strategy provides accredited investors—private, charitable, or institutional—a fixed income asset entirely dedicated to doing good in the community. All investments are promissory notes that pay regular interest and principal at maturity.

**Advance2025** is the flagship fund of our Advance Strategy that focuses on impact-driven small businesses in San Diego—broadly diversified across a variety of industries, impact segments, and leadership demographics. We provide financing from \$100,000 to \$500,000 to tenacious companies that have outgrown microfinance but can't get sufficient, affordable bank financing or venture capital.



**AdvanceHER**, in partnership with PCI, layers a gender lens on the Advance2025 portfolio, providing investors an opportunity to bolster organizations advancing the lives, leadership, and well-being of women and girls.



**AdvanceAPI**, also known as the API Growth Fund, directly targets borrowers in the Asian & Pacific Islander community. Launched in partnership with the Asian Business Association of San Diego, this pool drives capital and support to overlooked entrepreneurs and organizations dedicated to serving API constituents.

## Advance at a glance



**\$1.7M**

assets under  
management



**\$2.75M**

assets into  
community



**9**

borrowers



**\$278k**

average loan amount



**29  
months**

average loan length



**48%**

nonprofit borrowers\*



**70%**

owned or led  
by women\*



**36%**

owned or led  
by people of color\*

all information is reported as of August 31, 2019

\*cap-weighted since strategy inception

We believe Assets Into Community is the strongest financial measure of an impact investment firm. The distinction between Assets Into Community and Assets Under Management is driven in part by the revolving nature of the Advance Strategy. As borrowers repay, we reinvest capital into new loans, multiplying the impact of each dollar. As funds grow and mature, we expect Assets Into Community and Assets Under Management to diverge even more sharply, demonstrating the regenerative power of your investment.

# About mission driven finance

Mission Driven Finance is an impact investment firm dedicated to building a financial system that ensures good businesses have sufficient affordable access to capital. Built from the ground up with a single purpose—to make it easy to invest in your community—all our funds and structured products are designed to close financial gaps that will close opportunity gaps.

The financial systems, structures, and policies in America have both intentionally and unintentionally restricted access to capital and opportunity. The result is significant wealth inequality that hinders social mobility, dampens economic growth, and fosters conditions for political instability. We can change that.

We work with local and national investors to help them create the impact they want, and work with businesses and community partners to help them get the capital they need. Mission Driven Finance was launched in 2016 in San Diego, CA and is a Certified B Corporation. Our experienced, diverse team is 75% women and 50% non-white, and we are entirely focused on private market impact transactions and asset management.

**For more information, please contact David Lynn [david@missiondrivenfinance.com](mailto:david@missiondrivenfinance.com) (858) 880-0252 x701**

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