

2007 Social Investment Forum – Community Investing Survey

Please complete by: July 15, 2007

Email back to Prianjali Mascarenhas at prianjali@socialinvest.org or fax to 202-463-5125

Name:

Email:

Company:

Telephone:

“1% or More in Community Investing”

The Social Investment Forum is tracking actively managed dollars in Community Investing as of **12/31/2006**. Community investing provides financial services to lower-income communities in the U.S. and around the world, and supplies capital for small businesses, affordable housing, job opportunities, and vital community services like education. Our goal with this survey is to recognize Forum member investors that direct 1% or more of their actively managed funds into community investment through the vehicles listed in Question Two below.

Please contact Prianjali at 202-872-5335 or prianjali@socialinvest.org if you have any questions.

Please complete the following survey with information current as of 12/31/2006

1. Please indicate whether this survey represents the assets under your institution’s management or the assets that you professionally manage for clients: Institution _____ Professional _____

2. Please indicate the assets under your institution’s management or your professional management in:

- a. Community Development Banks \$ _____
 - b. Community Development Credit Unions \$ _____
 - c. Community Development Loan Funds \$ _____
 - d. International Community Development Funds \$ _____
 - e. Community Development Venture Capital \$ _____
 - f. Community Development Pooled Funds:
 - (Trade Associations, Calvert Notes, etc) \$ _____
 - g. Low Income Housing Tax Credits \$ _____
 - h. Other and/or Direct Community Projects \$ _____
 - Please specify _____
- OR i. None are directed to community at this time _____

TOTAL Community Investing \$ _____

3. Total assets under management (for your institution or for all your clients) \$ _____

4. What percentage of your total assets is dedicated to Community Investing? _____

5. Does your institution or do any of your clients use below market rate investments? Yes ___ No ___

6. Can the types of community investments you or your institution make be disclosed publicly, without the amount invested? - ie. can it be listed on a website next to your name that you invest in (for example) community development banks and international funds? Yes ___ No ___ Need More Info ___

7. Would you or your organization be interested in having your community investing profiled at www.communityinvest.org? Yes ___ No ___ Need More Info ___

Thank you for your participation.
