

The Social Investment Forum's Survey for the 1% in Community Campaign

The Social Investment Forum, the trade association of the socially responsible investing industry, calls on all investors to place at least 1% of their managed assets in community investments. If you are a financial professional or financial institution with at least "1% in community," we'd like to help publicize your work.

Forum members with at least 1% of their managed assets in community investments qualify for a number of outreach benefits. These include use of our community investing logo and promotion in print and electronic resources on community investing by the Social Investment Forum and its partner organization Co-op America. Co-op America educates consumers about purchasing and investment options.

If you are already a Forum member, please complete the survey on the following page and return it as indicated. You'll be contacted with information on the 1% campaign and on how to obtain the community investing logo and other benefits once you meet the 1% goal.

If you are not yet a Forum member, please complete the survey on the following page and return it as indicated. You'll be contacted with information on how to become a Social Investment Forum member (or go back one page and click on "Join the Social Investment Forum"). Membership enables you to use the community investing logo and to receive other resources and benefits.

Questions? Call toll-free: 888-441-2406

Social Investment Forum

Fax to 202-331-8166 or mail:

Attn: Fran Teplitz, SIF, 1612 K St., NW, Suite 650, Washington DC 20006

Name:

Email:

Company:

Telephone:

"1% in Community Investment"

The Social Investment Forum is tracking actively managed dollars in Community Investing. Community investing directs assets to lower-income communities in order to build those communities (e.g., through housing, employment opportunities, locally owned businesses, and social services). Our goal is to direct 1% or more of actively managed funds into community investment over five years, thereby tripling community investing assets.

Community Investment includes investments in:

Community Development Banks or Credit Unions, Community Development Loan Funds (including micro-credit), Community Development International Funds, Community Development Venture Capital, and Direct Community Projects (investing directly into a community building effort – not through a community development financial institution). ***Funds for communities through the community reinvestment act (CRA) are not included.***

1. Please indicate the assets under your institution's management or the assets that you professionally manage for clients is in:

- a. Community Development Banks _____
- b. Community Development Credit Unions _____
- c. Community Development Loan Funds _____
- d. Community Development International Funds _____
- e. Direct Community Projects _____
- f. Other (please specify below) _____

OR g. *None* are directed to community at this time _____

TOTAL Community Investing _____

Please specify any "other" _____

2. Total assets under management (for your institution or for all your clients) _____
3. What percentage of your total assets is dedicated to Community Investing? _____
3. If you answered g. (none) to question 1, do you want to take part in the Forum's 1% campaign?
Yes____ No____
- a. If yes, would you like future information from the Forum on how to reach the 1% goal?
Yes____ No____
4. Does your institution or do any of your clients use below market rate investments? Yes ____No ____
5. Do you think any of your clients would be willing to help the "1% in Community Investment" campaign by allowing their names to be used in conjunction with marketing efforts? If yes, the Forum will contact you to follow-up.

Yes____ No ____

Thank you for your participation.