



2023
Impact & Benefit Report

(800) 445-2142
ccdfi.com

All **2023** Projects

Clearinghouse
CDFI

Our **Impact** in
2023

The number of **clients/
customers** served

897,617 Total Served
84,782 African American

363,618 Latino/Hispanic
14,576 Native American/
Native Alaskan

**Total Project
Financing**
\$237 Million

Financing in 2023,
including NMTCs

Housing Units
1,089

Housing Units
Developed, Rehabilitated,
or Preserved in 2023

79%
of Housing Units Created
in 2023 are Designated
Affordable

NMTC Projects
100%

Financed in 2023 are
Minority Owned/Controlled
or Serve a Minority
Population

100%
Serve Low-Income
Communities Below 80%
Area Median Income

Jobs

5,407

Jobs Created or
Retained in 2023

25%
of Jobs Created or
Retained in 2023 are in
High Unemployment Areas

70 Total Projects Financed in 2023:

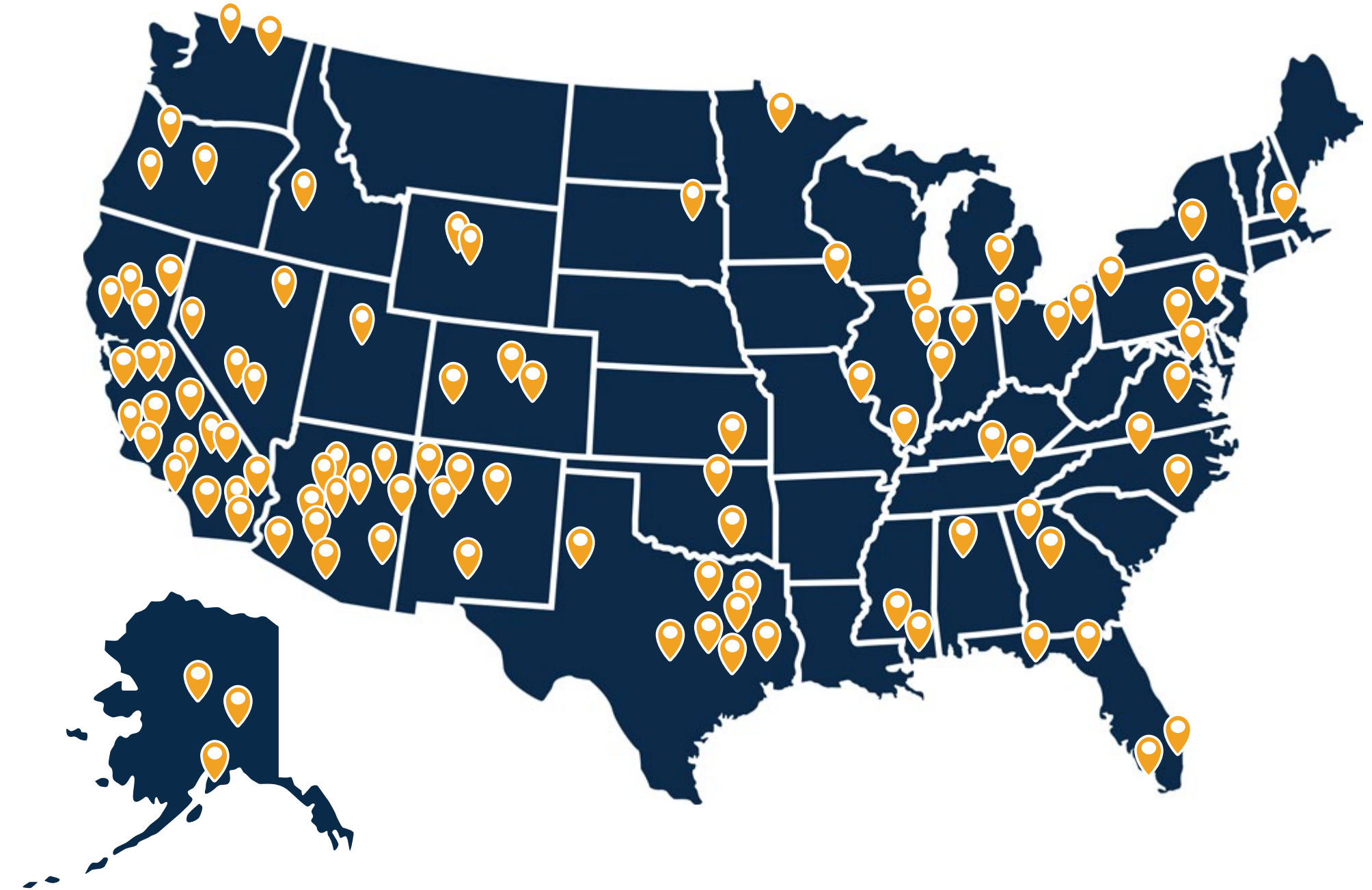
47%
Located in
Low-Income
Communities

14%
Located in
Non-Metropolitan
Areas

7%
Located in
Persistent
Poverty Areas

Our **Impact** Since

1996



Since Our **Inception...**

\$2.5 Billion

in Cumulative
Lending

4.87 Million

Total Customers
Served

2,678

Total Projects
Funded

13,067

Affordable Housing Units
Created, Rehabilitated,
or Preserved

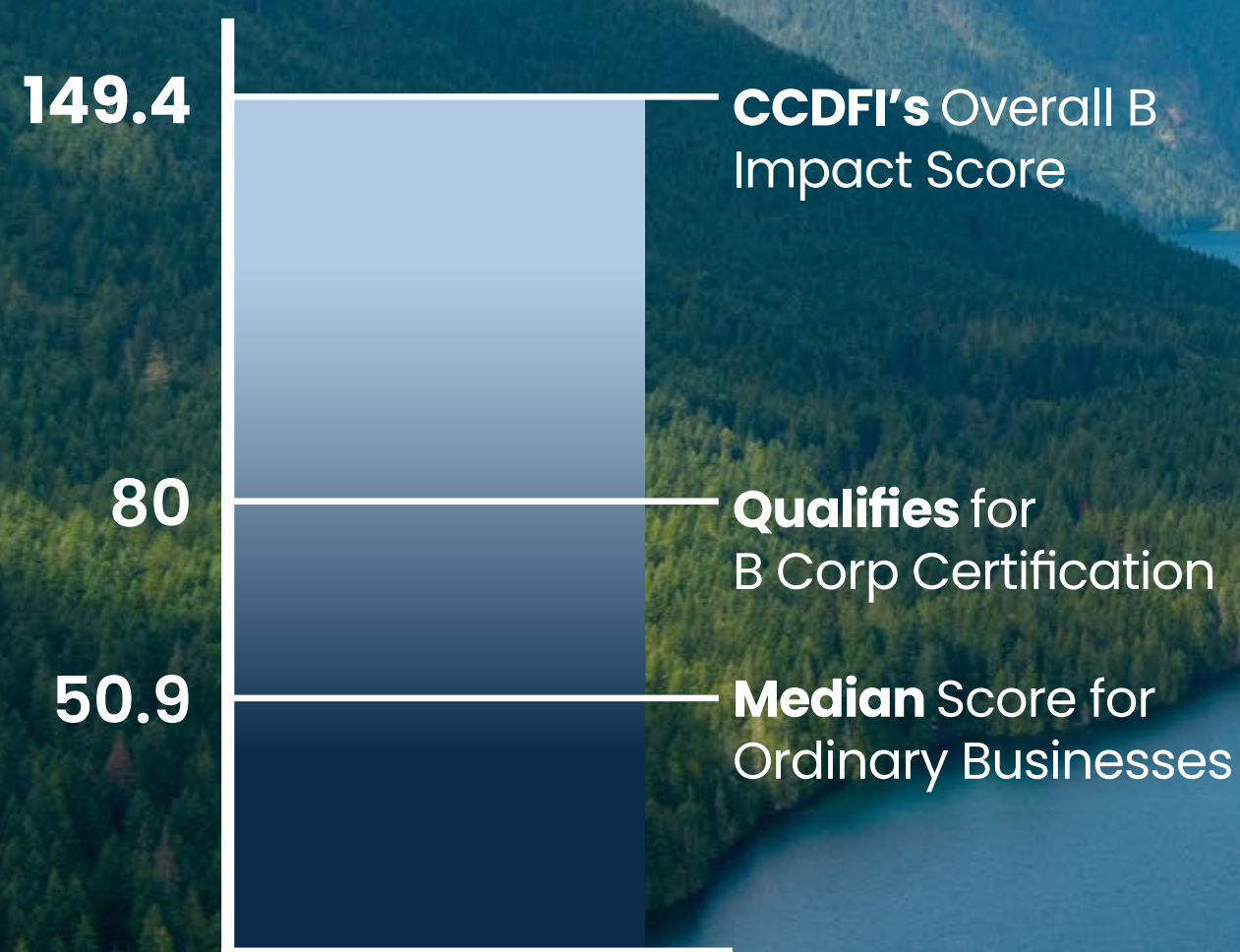
43,817

Jobs Created
or Retained



Certified B Corporations are **leaders** in the global movement for an **inclusive, equitable, and regenerative economy**. Clearinghouse CDFI has been a Certified B Corporation since 2014.

Our B Corp Certification Score



Score Breakdown

Governance	21.6
Workers	29.8
Community	22.0
Environment	15.8
Customers	58.7



B Corp Committee

Lacey Dixon
CHAIR

Yves Mombeleur
EXECUTIVE LIAISON

- Allie Weber
- Analisa Wells
- Brian Sagert
- Donald Degollado
- Karyna Tafel
- Kat Donovan
- Lawrence Chavez
- Lisa Van Ella
- Susan Montoya

"We were entrusted to be **good stewards of this planet**. It's our responsibility to find ways to help the people in our communities, take care of our environment, and **make this world a better place...**"

- Lisa Van Ella,
Clearinghouse CDFI's
2023 B Champion



"On behalf of the Board of Directors, I am pleased to announce that Clearinghouse CDFI has successfully pursued its general public benefit in material respects for 2023."

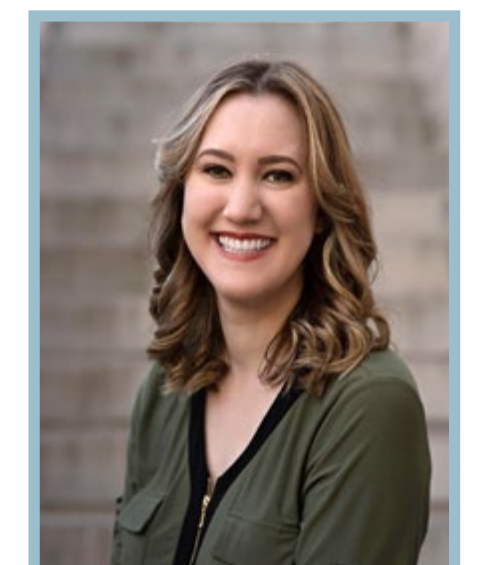
Gary Dunn
Chairman, Board of Directors

"The **mission driven** work that the B Committee accomplishes every year is **a staple of Clearinghouse CDFI...**

...and I am so lucky to get to be a part of it! This past year we made incredible strides in our Women's Network, creating safe and informative spaces where we spoke with powerful women in different areas of business and empowered each other.

We also set up multiple company-wide volunteer events that worked to help the environment, our troops, and multiple food banks right in our own communities. And we cultivated a spark in our environmental practices that will be front and center in 2024 as we focus on ways to be greener in our company and lending practices. I am inspired daily by B Committee and I cannot wait to see what the future has in store!"

- Lacey Dixon
B Corp Committee Chair



2023 Charitable Contributions

2023 Total Charitable Contributions
\$133,215

2023 Charitable Recipients
20

Youth and Family Services
\$35,550

Shelter and Housing Programs
\$47,691

Veteran/Military Organizations
\$5,000

Community Development
\$31,000

Native American Organizations
\$10,474

Other Nonprofits
\$3,500

Total Charitable Contributions Since Inception
\$2.57 Million

Staff Volunteering Efforts

1,669

Volunteer Hours at

62 Organizations

Top Volunteers + Volunteered Hours

Cesar Plascencia
250 hours

Yves Mombeleur
244 hours

Karyna Tafel
180 hours

Susan Montoya
143 hours

Donald Degollado
130 hours

Kristy Ollendorff
106 hours



2024 Real Leaders Top Impact Companies

Clearinghouse CDFI
 Ranked #63 out of 185
 Total Companies



OC Civic 50:

Recognized as one of the 50 most Community-Oriented Companies in Orange County, CA



Clearinghouse CDFI established the first B Locals regional chapter for Orange County and hosted the first meeting at our headquarters.

www.blocaloc.org



'B' BOLD(ER) Internship Program

Building Bridges through Outreach, Leadership Development, Engagement, and Recruitment

The Allen Peters Baldwin 'B' BOLD Internship Program is an initiative created by Clearinghouse CDFI and inspired by B Corp values to build bridges that empower and develop the next generation.

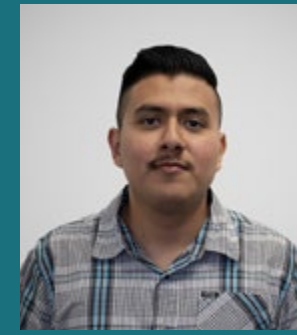
Clearinghouse CDFI, with the support and generosity of its community partners, offers this internship program for college-bound high school juniors and seniors from low to moderate income families.

"The 'B' BOLD(ER) internship has allowed me to gain the skills, resources, and knowledge I need to succeed in my professional and financial life."

-Natalia Trejo
 2023 'B' BOLD(ER) Intern

2023

'B' BOLD™ Interns High School



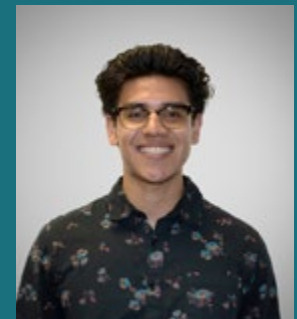
Kevin Maciel



Ryn Torres

2023

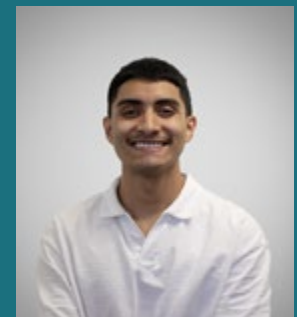
'B' BOLD(ER) Interns College



Oscar Jimenez Perez



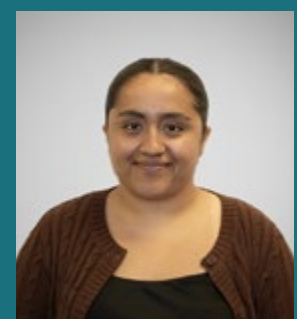
Elizabeth Jimenez-Magadan



Omar Sosa



Robin Tittlebaugh



Natalia Trejo



Katie Nguyen



 **Headquarters**

Lake Forest, California

 **Additional Office Locations**

Albuquerque, New Mexico

Dallas, Texas

Las Vegas, Nevada

Phoenix, Arizona

(800) 445-2142

[ClearinghouseCDFI.com](https://www.ClearinghouseCDFI.com)

