



2024 Impact & Benefit Report



(800) 445-2142
ccdfi.com

2024 Charitable Contributions

2024 Total Charitable Contributions

\$133,759

2024 Charitable Recipients
21

Shelter and Housing Programs
\$20,335

Youth and Family Services
\$25,000

Health Organizations
\$27,575

Housing Programs
\$24,049

Veterans and Public Service
\$10,300

Environmental Programs
\$5,000

Community Services
\$10,000

Public Safety Support
\$5,000

Animal Welfare/Rescue Services
\$1,000

Other Nonprofits
\$5,500

Total Charitable Contributions
Since Inception

\$2.73 Million



Staff
**Volunteering
Efforts**

1,975
Volunteer Hours at
72 Organizations



RealLeaders®

Named to **2025 Real
Leaders of Impact**
Investing List

CCDFI named Most Transparent
Company and ranked #55 of 134
in Real Leaders Global Top Impact
Companies for 2025



OC Civic 50:

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



CCDFI Named Among
Orange County
Top Workplaces

Our Impact in 2024

The number of **clients/
customers** assisted

345,961

Total Assisted

32,628

African American

43,915

Latino/Hispanic

19,255

Native American/
Native Alaskan

Since Our Inception...
(including NMTCs)

\$2.7 Billion

in Cumulative Lending

5.1 Million

Total Individuals Assisted

13,548

Affordable Housing Units Created,
Rehabilitated, or Preserved

2,733

Total Projects Funded

43,856

Jobs Created or Retained

All 2024 Projects

Total Project Financing

\$210 Million

Financing in 2024,
including NMTCs

NMTC Projects

60%

of NMTC Projects
Financed in 2024
are Native-Owned

100%

Serve Low-Income
Communities Below 80%
Area Median Income

Housing Units

563

Housing Units
Developed, Rehabilitated,
or Preserved in 2024

90%

of Housing Units Created
in 2024 are Designated
Affordable

Jobs

1,937

Jobs Created or
Retained in 2024

75%

of Jobs Created or
Retained in 2024 are in
High Unemployment Areas

All 2024 Projects

49%

Total Projects
(including NMTCs)
Financed in 2024

41%

Located in
Low-Income
Communities

20%

Located in
Non-Metropolitan
Areas

Certified



Corporation

Certified B Corporations are business leaders that voluntarily meet certain standards of **transparency, accountability, sustainability,** and performance, with an aim to create value for **society, stakeholders, and shareholders.**

Our B Corp Certification Score

149.4

CCDFI's Overall B
Impact Score

80

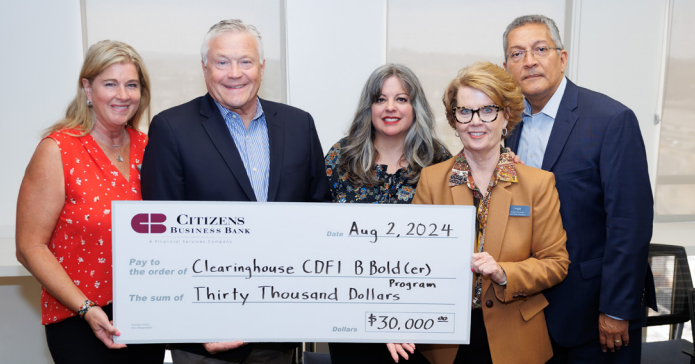
Qualifies for
B Corp Certification

50.9

Median Score for
Ordinary Businesses

Score Breakdown

Governance	21.6
Workers	29.8
Community	22.0
Environment	15.8
Customers	58.7



'B' BOLD(ER)[™] Internship Program

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

The Allen Peters Baldwin 'B' BOLD[™] Internship Program, created by Clearinghouse CDFI and inspired by B Corp values, empowers and develops the next generation.

With support from community partners, the program offers internships to **college students and college-bound high school juniors and seniors from low- to moderate-income families.**

“ My internship at CCDFI has been an enriching experience, blending practical onsite experiences with comprehensive workshops and personal development sessions. The diverse range of topics covered has **equipped me with valuable skills and insights into the banking and finance industry,** laying a strong foundation for my future career. ”

-Dylan Heredia
2024 'B' BOLD(ER)[™] Intern

2024

'B' BOLD[™] Interns
High School

Orlando Mendez
Veronika Garcia

2024

'B' BOLD(ER)[™] Interns
College

Alexis Alba
Dean Pfeiffer
Dylan Heredia
Kevin Morales
Leslie Cerano
Logan Ortiz
Shannon Lawrence
Sofia Ruiz-Plasencia



TOP ROW:

Shannon Lawrence, Dean Pfeiffer, Veronika Garcia,
Orlando Mendez, Leslie Cerano

BOTTOM ROW:

Logan Ortiz, Kevin Morales, Dylan Heredia

B Corp Committee

Allie Weber
2024 CHAIR

Yves M. Mombeleur
EXECUTIVE LIAISON

Analisa Wells
Annie Norwood
Brian Sagert
Donald Degollado
Jeffrey Binder
Karyna Tafel
Kat Donovan
Katelyn Phinney
Keoni Gray
Lacey Dixon
Lawrence Chavez
Lisa Van Ella
Mai Ha
Susan Montoya



"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 2024."

Gary Dunn

Chairman, Board of Directors

*A pillar of strength,
driving our mission...*

"Serving as Chair for the B Committee this year has been a humbling and transformative experience. **Together, we grew participation by 40%**, ensuring representation across departments and fostering deeper engagement throughout Clearinghouse CDFI. **The Women's Network launched a book club** to empower future female leaders, and the Volunteer Committee inspired greater participation in events like the Alzheimer's Walk.

I've learned so much from this incredible team, and **I am confident the B Committee will remain a pillar of strength, driving our mission forward in the years to come."**

Allie Weber

2024 B Corp **Committee Chair**

