

**LiftFund**

DREAM IT. FUND IT.



**2020 ANNUAL REPORT**

RESILIENCY IS IN OUR DNA

## OUR 2020 IMPACT AT A GLANCE

**\$98.2 Million**  
In Funding

**\$46.2 Million**  
In SBA 504 Loans

**7,120**  
Business Support Hours

**433**  
Events Hosted



*“Resilience, innovation and **perseverance** run in the entrepreneur’s DNA. They find ways to rise despite adversity and challenges, even the unimaginable like COVID-19. In 2020, we witnessed the strength of small business every day through the thousands of clients we supported.”*

**Janie Barrera,**  
President & CEO, LiftFund



**“After 10 years of hard work and dedication, I was devastated at the thought that the pandemic would force me to close my doors. Thankfully, through programs like LiftFund, my business has a chance to survive this unexpected situation.”**

GABRIELA RIOS | SPOSA BELLA

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## A Message from Our President & CEO and Board Chair

In 2020, we experienced a global pandemic and racial tensions that shook our way of life and how we conduct business. Our team immediately faced the challenge and served as small business frontliners, because we knew that our work was needed more than ever. Lifting black, indigenous and people of color (BIPOC) and women to reach financial security and prosperity through entrepreneurship has been in LiftFund’s DNA for over 27 years. We believe that building assets and wealth creates a brighter future and equips a person to break the cycle of poverty.

While 2020 amplified systemic inequalities that have historically impacted BIPOC and women-owned businesses, we were confident that resiliency, humility and adaptation would kick in our clients’ DNA. We were right.

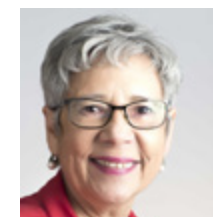
During 2020, we equipped 4,500 small businesses with \$98.2 million in relief funding, including:

- Small business loans
- Forgivable loans
- Grants
- Loan payment relief
- and the SBA’s Paycheck Protection Program (PPP)

We also provided business support to more than 6,500 clients, including in-depth consultations and relevant webinars that helped them navigate through an economic depression and a global pandemic. We saw the tenacity of our clients and we also experienced your generosity. Because of you - our partners, investors and funders - and your support, we received a lifetime gift from MacKenzie Scott to strengthen our DNA.

As we reflect on 2020, it is not lost upon us that BIPOC and women small business owners suffered the most because of historic barriers. We know the arc of the moral universe is long, but 2020 proved that with our clients’ instinctive drive and LiftFund’s steadfast commitment to leveling the financial playing field, we as a community can get there together and make a difference.

Thank you for your support. We look forward to our continued efforts in 2021.



**Janie Barrera**  
PRESIDENT & CEO



**Jimmie Keenan,  
Major General, USA (Ret.)**  
BOARD CHAIR

# OUR 2020 IMPACT: COVID-19 FUNDING

In the midst of the pandemic, LiftFund rallied a community of generous supporters to provide rapid and impactful relief to small business owners facing the economic impact of COVID-19.

Total Amount	Loans Provided	
\$43.6 Million	1,863	
Average Loan Size	Jobs Created	Jobs Retained
\$23,427	4,893	6,632

Total Grant Funding Awarded	Grants Awarded
\$54.6 Million	2,705

## 504 LOANS

Total Amount	Jobs Created
\$46.2 Million	536
Loans Provided	
53	



# COVID-19 PARTNERS

In partnership with generous supporters, we launched a variety of relief and recovery funding options for small business owners across our footprint.

Appalachian Community Capital Amerant Bank Austin Community Foundation Bank of America BBVA Foundation Bexar County Capital One City of Corpus Christi City of El Paso	City of Laredo City of Las Cruces City of Pearland City of San Antonio City of Socorro Comerica Charitable Foundation Communities Foundation of Texas County of El Paso Frost Bank	Goldman Sachs H-E-B Hispanics in Philanthropy MUFG Union Bank Foundation National Association for Latino Community Asset Builders New Mexico Small Business Investment Corporation New Orleans Business Alliance	Pearland Economic Development Corporation PNC Foundation Port of Corpus Christi Authority San Antonio Area Foundation SWBC Foundation Texas Bankers Association Texas Bankers Foundation Texas Women's Foundation The Michael and Susan Dell Foundation	Truist Bank U.S. Department of the Treasury Community Development Financial Institutions Fund U.S. Economic Development Administration U.S. Small Business Administration USAA USAA Foundation, Inc. Wells Fargo
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# OUR 2020 IMPACT: BUSINESS GUIDANCE & SUPPORT

In 2020, our small business support team pivoted to offer programming, events and consultation services virtually and COVID-19 related to guide small businesses through the pandemic.

Business Support Hours Provided	Clients Served	Workshops Hosted	Workshop Participants
7,120	6,536	433	2,200

## Top Consultation Topics

				
Credit Review	How to Access Capital	Financial Education, Planning, Management	Startup Assistance	Sales

“We are very grateful for the support received through this grant, which will help us maintain the salary of our employees, pay the rent and continue to offer our services to clients. LiftFund was definitely here at the moment when we needed it the most.”

ADAN VENTURA | TASTY PAELLA



## WOMEN’S BUSINESS CENTERS DALLAS / FORT WORTH & SAN ANTONIO

In partnership with the U.S. Small Business Administration, LiftFund operates two Women’s Business Centers (WBC) in San Antonio and Dallas/Fort Worth to empower women and minorities with guidance, training, and business resources. Our WBCs launched COVID-19 Business Resiliency Programs to provide timely guidance and support to women and entrepreneurs of color.



1,642	CONSULTATIONS PROVIDED
238	EVENTS HOSTED
49	BUSINESSES STARTED
38	JOBS CREATED
772	JOBS RETAINED

## LAUNCH SA

Community is at the core of the Launch SA program. This program, a partnership with the City of San Antonio, adapted its events and services to a virtual setting creating a space for candid peer-learning sessions and connectivity.



1,941	CLIENTS SERVED
161	EVENTS HOSTED
539	ASSISTANCE REQUESTS

# OUR 2020 CLIENT PROFILE

## Top Industries



Service



Professional Technical Services



Transportation & Warehousing



Retail



Construction

## Client Business Stages

51%

0-5 Years

17%

6-10 Years

32%

10+ Years

LiftFund was a place that took a chance on somebody who was thinking outside the box. LiftFund was the one that believed in us.

SUSAN LYNN PRATHER | THE WAE CLINIC



Hispanic 54%  
Other 12%  
African American 9%  
White 25%



44% FEMALE  
56% MALE  
65% LMI INDIVIDUALS\*  
7% VETERANS + VETERAN SPOUSES

\*CDFI TARGET MARKET

LiftFund being here for me during this pandemic, has allowed me to pivot successfully and add a valuable service to my clients.

NAOMI J HARDY | DUNAMIS TRANSITION





“ I have been a professional chef for almost thirty years. We are so fortunate to have connected with LiftFund so we can focus on the management and food quality of our restaurant!”

Jun Sun  
SZECHUAN SPICE RESTAURANT

“ LiftFund has allowed me to have a sense of security in a world where COVID-19 upended so many lives.”

Nguyet “Vikki” Howard  
SKILLFUL TOUCH MASSAGE



“ The most challenging part of starting a business is obtaining access to capital and an influential network. Liftfund is much more than a lender and helped us with both of those areas.”

Gabriela and Quitman Smith  
BIG STATE CONSTRUCTION

“ As we navigate this pandemic trying to figure a way to survive, the grant truly comes in like a lifeline.”

Paola Herrera Terrazas  
BITE OF LIFE ENTERPRISE



“ I am more knowledgeable about business and the resources available to help me grow. My goals were limited because I lacked the business information. Now, my goals are much bigger. The Women’s Business Center gave me the confidence to realize my dream.”

Martha Elena Trejo  
TOLTEX CONSTRUCTION

“ A lot of folks are struggling because of COVID-19, but there’s still opportunities out there. The LiftFund staff knew I was more than a number or a credit score. They gave me that opportunity.”

Tony Patrick  
OLD SOUTH BBQ



# FINANCIAL STATEMENTS

	2020	2019
Revenue & Expenses		
TOTAL PUBLIC SUPPORT & REVENUE*	\$103,246,914	\$20,675,930
TOTAL EXPENSES*	\$86,841,967	\$17,940,524
CHANGE IN NET ASSETS	\$16,404,947	\$2,735,406
*2020 INCLUDES \$64,442,040 OF PASS THROUGH GRANTS UNDER THE CARES ACT: LIFTFUND RECEIVED MONIES FROM VARIOUS MUNICIPALITIES TO PASS THROUGH AS GRANTS TO QUALIFYING SMALL BUSINESSES.		
Historic Impact		
AMOUNT DISBURSED SINCE INCEPTION	\$371,429,591	\$324,731,618
NUMBER OF LOANS	23,210	21,582
CLIENTS SERVED	16,939	15,291
Balance Sheet		
TOTAL ASSETS	\$114,123,506	\$77,666,837
TOTAL LIABILITIES	\$78,673,342	\$58,621,620
TOTAL NET ASSETS	\$35,450,164	\$19,045,217
TOTAL LIABILITIES & NET ASSETS	\$114,123,506	\$77,666,837
Portfolio & Client Insights		
LIFTFUND OWNED	\$64,917,927	\$48,134,623
LIFTFUND SERVICING PORTION	\$13,360,493	\$15,633,381
PORTFOLIO	\$78,333,975	\$63,768,004
ACTIVE CLIENTS	3,231	2,523
AVERAGE LOAN SIZE	\$24,244	\$25,275
DELINQUENCY RATE	3.24%	3.18%
NET LOSSES	2.54%	3.59%

# OUR 2020 DONORS

## \$20 Million +

CITY OF SAN ANTONIO ECONOMIC DEVELOPMENT DEPARTMENT

## \$15 - \$19.9 Million

BEXAR COUNTY

## \$10 - \$14.9 Million

CITY OF EL PASO  
MACKENZIE SCOTT

## \$1 - \$4.9 Million

CITY OF CORPUS CHRISTI  
CITY OF LAREDO  
COMMUNITIES FOUNDATION OF TEXAS  
EL PASO COUNTY  
THE GOLDMAN SACHS FOUNDATION  
TRUIST BANK  
U.S. ECONOMIC DEVELOPMENT ADMINISTRATION  
U.S. SMALL BUSINESS ADMINISTRATION  
USAA

## \$500,000 - \$999,999

CITI FOUNDATION  
CITY OF PEARLAND  
U.S. DEPARTMENT OF THE TREASURY COMMUNITY  
DEVELOPMENT FINANCIAL INSTITUTIONS FUND

## \$250,000 - \$499,999

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## \$100,000 - \$249,999

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SAN ANTONIO AREA FOUNDATION

## \$50,000 - \$99,999

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THE BRIDGEPATH  
UNITED TEXAS BANK

A GIFT DESIGNATED BY JOHN AND AMY HAYES, FROM  
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PNC FOUNDATION  
SWBC FOUNDATION  
THE WIEDERHOLD FAMILY\*  
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VERIZON  
WOODFOREST NATIONAL BANK

*\*LiftFund's Dream Makers Fund is a permanent revolving loan fund developed to meet the growing demand of affordable, ethical financing. Our Dream Makers Fund donors are creating an everlasting impact and contributing to the economic strengthening of their communities.*





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## \$1,000 - \$9,999

## \$1 - \$999

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to high standards  
recognized in our  
industry and in the  
nonprofit sector.



*\*LiftFund's Dream Makers Fund is a permanent revolving loan fund developed to meet the growing demand of affordable, ethical financing. Our Dream Makers Fund donors are creating an everlasting impact and contributing to the economic strengthening of their communities.*

# OUR 2020 INVESTORS

## \$15 Million +

FEDERAL RESERVE BANK	GOLDMAN SACHS
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## \$5 - \$9.9 Million

BEXAR COUNTY	CREDIT HUMAN	PEOPLESFUND
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## \$1 - \$4.9 Million

AMERICAN BANK BANCORPSOUTH BANK OF AMERICA BBVA USA CADENCE BANK CITY OF CORPUS CHRISTI CNOTE	CPS ENERGY, RESIDENTIAL ENERGY ASSISTANCE PARTNERSHIP, INC. (REAP) FROST BANK HANCOCK WHITNEY BANK IBERIABANK MUG UNION BANK FOUNDATION OBLATE INTERNATIONAL PASTORAL	OPPORTUNITY FINANCE NETWORK SUNCOAST CREDIT UNION THE MICHAEL & SUSAN DELL FOUNDATION U.S. SMALL BUSINESS ADMINISTRATION WELLS FARGO WOODFOREST NATIONAL BANK
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## \$250,000 - \$999,999

AFFORDABLE HOMES OF SOUTH TEXAS, INC. ALLEGIANCE BANK BELDON FAMILY FOUNDATION CAPITAL ONE CIT BANK, N.A. CITY OF EL PASO COMMUNITY FOUNDATION FOR GREATER ATLANTA EAST WEST BANK EDWARD BANOS & BRENDA LANZEL FARM BUREAU BANK	FIRST NATIONAL BANK TEXAS HOMETOWN BANK MAPLEMARK BANK MOODY NATIONAL BANK NATIONAL ASSOCIATION FOR LATINO COMMUNITY ASSET BUILDERS ORIGIN BANK PIONEER BANK RANDOLPH BROOKS FEDERAL CREDIT UNION RAZA DEVELOPMENT FUND, INC.	SAM & LAURA DAWSON SIMMONS BANK SISTERS OF THE INCARNATE WORD AND BLESSED SACRAMENT SUSTAINABLE COMMUNITIES FUND TANYA SPENCER TEXAS COMMUNITY BANK TEXAS DEPARTMENT OF AGRICULTURE THE BANK OF SAN ANTONIO
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## \$100,000 - \$249,999

APPALACHIAN COMMUNITY CAPITAL BASILIAN FATHERS OF TORONTO CENTRAL BANK CONGREGATION OF DIVINE PROVIDENCE CONGREGATION OF THE SISTERS OF CHARITY OF THE INCARNATE WORD	ECONOMIC JUSTICE FUND, A FUND OF TIDES FOUNDATION FIRST CITIZENS BANK LISSA MARTINEZ NAZARETH LITERARY & BENEVOLENT INSTITUTION	NEW MEXICO SMALL BUSINESS INVESTMENT CORPORATION RELIGIOUS COMMUNITIES IMPACT FUND ROBERT BOEHLERT
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## \$50,000 - \$99,999

ADORERS OF THE BLOOD OF CHRIST AMEGY BANK BROADWAY BANK CARLIDGE FAMILY TRUST	DAVID & DONNA BLAIR MANUEL & MARIA BERRIOZÁBAL SISTERS OF SAINT DOMINIC SOCIETY OF THE DIVINE WORD	TEXAS WOMEN'S FOUNDATION TOLLESON WEALTH MANAGEMENT
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“It wouldn't be much of an exaggeration to say that this grant will probably go a long way towards saving our lives!”

JUNGSUK KIM | THE MAGPIE



## \$25,000 - \$49,999

ARTHUR SITTERLE III & ANDREA SITTERLE CHARLES CONLON ELLEN RIOJAS CLARK	REGIONS BANK RICK SCHIMPF SCRAPSOURCE, LLC
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## \$10,000 - \$24,999

BONNIE REED EDWARD & LUZ ELENA DAY ELIZABETH BLISSMAN GEORGE & ELIZABETH GODWIN	GEORGE HERNANDEZ JR. JOSE & ELOISE AVILA MICHAEL TAYLOR REDMAN FOUNDATION	REED HURLEY ROGER & TERRI VIROST WILLIAM & MARILYN MOLL
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## \$500 - \$9,999

AISSATOU SIDIMÉ-BLANTON ANNA-BROOKE GUTZLER ARTHUR MEDINA ARTHUR & SYLVIA REYNA BENJAMIN COERVER BILL & MARY REGAN CHARLES GONZALEZ CYNTHIA SPIELMAN DANIEL LOPEZ & GINA AMATANGELO	DEBRA SALGE ELIOT LEE HARRY SHAFER JAMES PITTMAN JR. LINDA TOYOTA LUCAS COERVER LUCIA COERVER MARCUS HERVEY & TRACIE SHELTON HERVEY MARY ESTHER ESCOBEDO	MARY GREEN M. KATHRYN MARTIN NORMA GONZALES PRITI MODY-BAILEY RHONDA WILEY-JONES ROSE MARY FRY SONGBAE LEE WILLIAM ELIZONDO
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DREAM IT. FUND IT.



*LiftFund transforms lives by opening doors, leveling the financial playing field and building a community of shared success.*

LiftFund.com

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