

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

\$43.6 Million

Loans Provided

1,863

Average Loan Size

\$23,427

Jobs Created

4,893

Jobs Retained

6,632

Total Grant Funding Awarded

\$54.6 Million

Grants Awarded

2,705

504 LOANS

Total Amount

\$46.2 Million

Loans Provided

53

Jobs Created

536



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

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City of Las Cruces
City of Pearland
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City of Socorro
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Communities Foundation of Texas
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Goldman Sachs
H-E-B
Hispanics in Philanthropy
MUFJ 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

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

7,120

Clients Served

6,536

Workshops Hosted

433

Workshop Participants

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

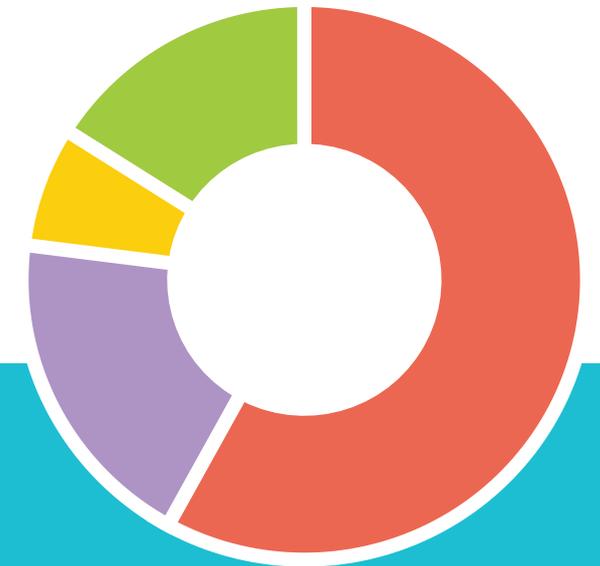
- 51%**
0-5 Years
- 17%**
6-10 Years
- 32%**
10+ Years

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%**



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

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

*CDFI TARGET MARKET



“ 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

“ 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



“ 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



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
<small>*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.</small>		
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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MASTERCARD IMPACT FUND
WELLS FARGO

\$100,000 - \$249,999

BUILDERS SURPLUS, MIKE AND CAROL DEVEREAUX*
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\$50,000 - \$99,999

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\$25,000 - \$49,999

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\$10,000 - \$24,999

A GIFT DESIGNATED BY JOHN AND AMY HAYES, FROM
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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.*

OUR 2020 DONORS

\$1,000 - \$9,999

\$1 - \$999

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AERIS
RATED
★★★★ BBB

LiftFund is committed 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

\$5 - \$9.9 Million

BEXAR COUNTY CREDIT HUMAN PEOPLEFUND

\$1 - \$4.9 Million

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\$250,000 - \$999,999

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