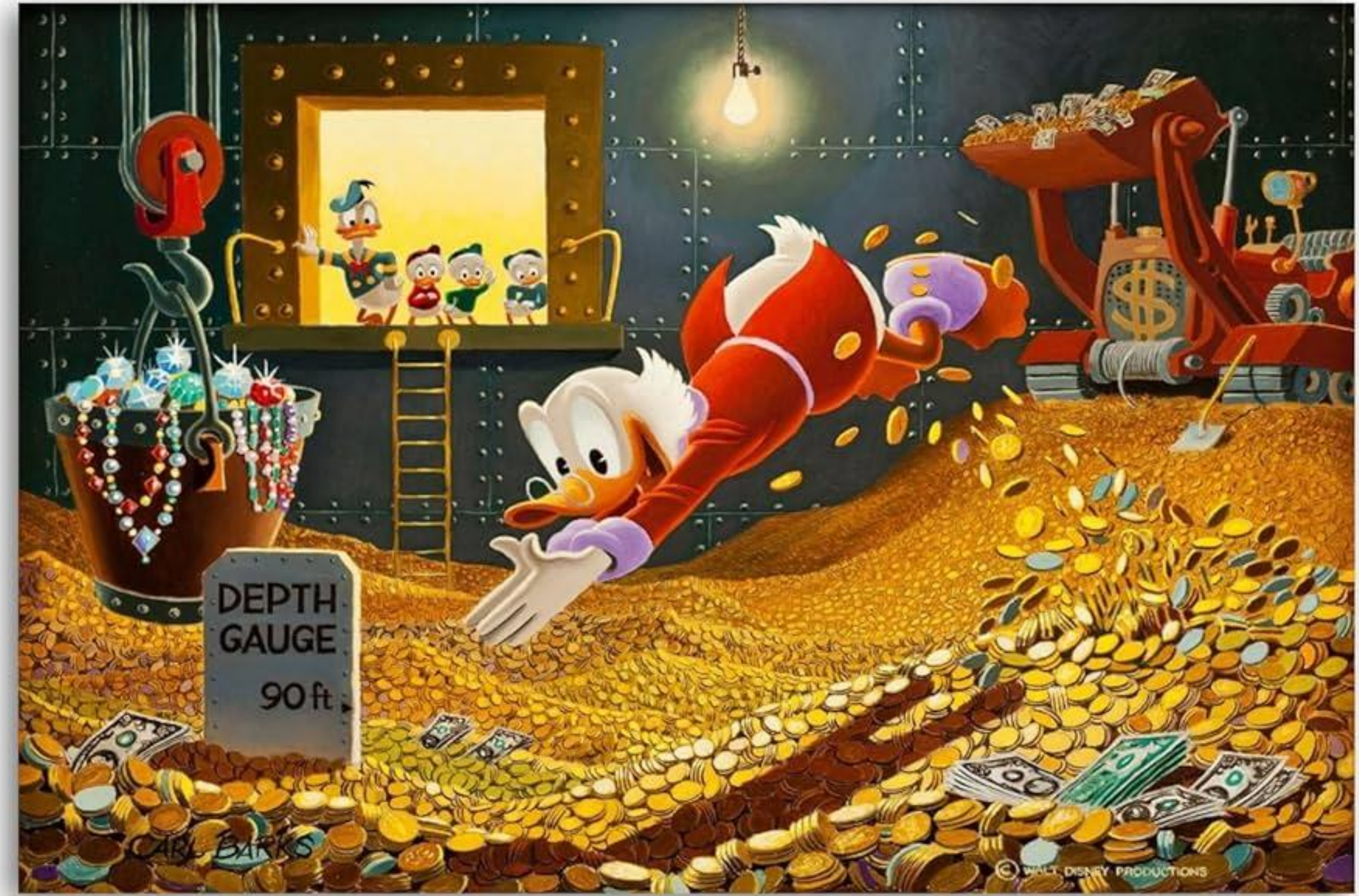
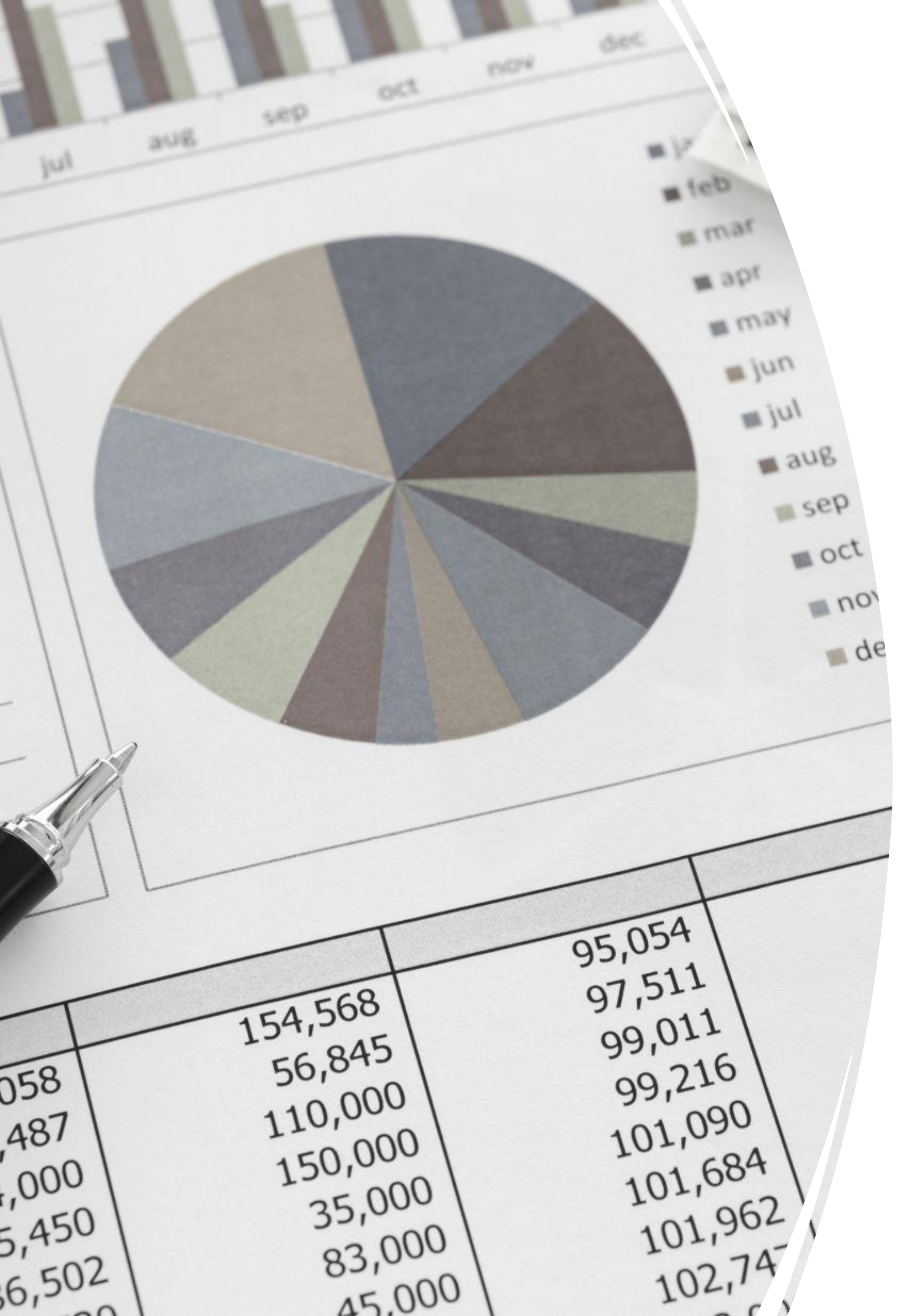
Partnering with Financial Entities to Grow and Sustain Nonprofits

Introductions

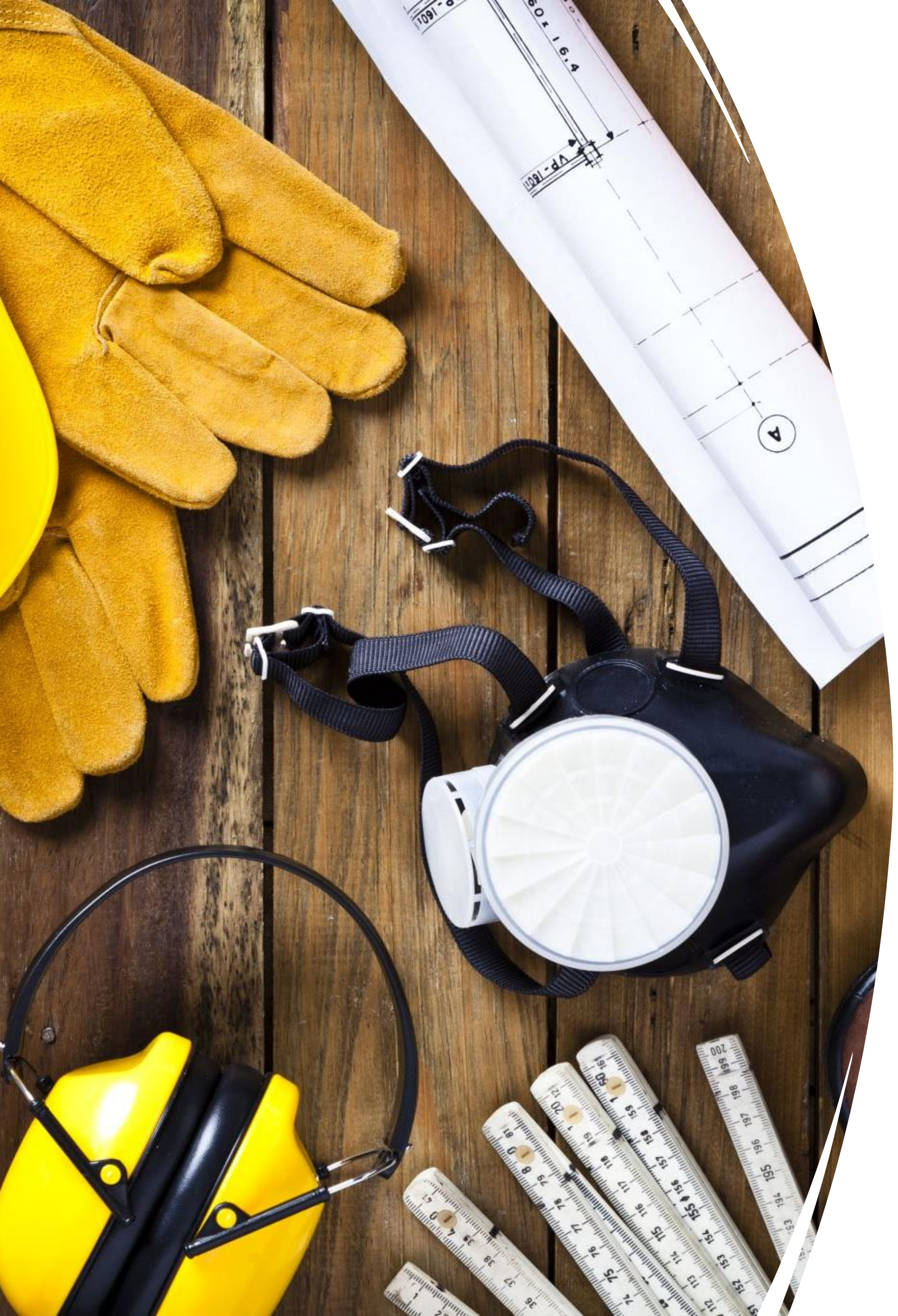
- Patrick Larkin-CSR
- Adelcio Lugo-Self-Help Credit Union
- Thais Pepe-Neighborhood Lending Partners
- Tiffany Peralta-BankUnited
- Stephen Ponzillo-Regions Bank
- Rich Rollason-Florida Community Loan Fund


DEPTH
GAUGE
90 ft
CARL BARKS
© WALT DISNEY PRODUCTIONS



Why Partner with Financial Institutions?

- Financial institutions play a critical role in supporting nonprofits through funding, technical assistance, and strategic partnerships.
- Beyond traditional loans and grants, they offer access to financial expertise, networking, and advocacy for community causes.
- **Benefits of Partnership:**
  - Expanded access to capital and funding (e.g., lines of credit, project financing).
  - Operational support and capacity-building opportunities.
  - Collaboration on community and economic development initiatives.



Key Areas of Partnership

- **Project Financing**: Support for affordable housing, community development, and social impact projects.
- **Core Operating Support**: Beyond project-specific funding, nonprofits benefit from unrestricted or operational support.
- **Technical Assistance**: Expertise in financial management, compliance, and capacity building.
- **Volunteer Engagement**: Encouraging financial institutions to support through skilled volunteer programs.

Best Practices for Building Strong Partnerships

1. **Relationship Building**: Invest time in developing strong, long-term relationships with financial institutions, particularly relationship managers.

2. **Aligning Missions**: Demonstrate how the nonprofit's mission aligns with the financial institution's goals for social impact.

3. **Transparency and Communication**: Maintain open, ongoing communication about organizational needs and the impact of the institution's support.

4. **Long-term Commitments**: Work towards multi-year support agreements that provide financial stability and long-term collaboration.

5. **Leverage Existing Resources**: Partner on technical assistance, financial literacy, and workforce development programs that banks often provide.

Thank You

Patrick Larkin

patrick@expertiseinresults.com

Adelcio Lugo

Thais Pepe

Tiffany Peralta

Stephen Ponzillo

Rich Rollason