

# Fund Management

## Seamless Loan Fund Management with Proven Expertise

CRF's Fund Management services support program sponsors and lenders in building robust, consistent loan portfolios that support a program's requirements and lending targets. This full-service offering utilizes CRF technology solutions and hands-on administrative support.

### Features:

- ✓ **Technology Integration**  
CRF's technology solutions help maximize the impact of fund dollars and make meaningful progress towards a more equitable economy.
- ✓ **Portfolio & Impact Reorting**  
CRF provides periodic portfolio status reports, offering a comprehensive overview of performance metrics, financial health, and strategic insights.
- ✓ **Partner Enrollment**  
CRF leverages a two-step due diligence process to successfully identify and confirm eligibility of lenders to participate in managed funds.
- ✓ **Loan Sales**  
CRF Exchange is a platform that enables CDFIs and other mission-driven lending partners to easily and efficiently enroll or sell loans into funds, loan guarantee programs, collateral support programs, and other similar structures.
- ✓ **Streamlined Application Process**  
CRF Connect is a hosted web application that connects small businesses to a network of mission-driven service partners who provide responsible lending products, grant products, and access to technical assistance and business counseling programs.

CRF's approach to program design and management is centered around customer experience and community impact. To date, CRF has played an active role in 12 funds, supporting more than \$320 million in lending.

CRF worked in partnership with the City of New York to co-create the groundbreaking \$75 million NYC Small Business Opportunity Fund. The program successfully deployed more than \$85 million in capital to 1,046 businesses across the city's five boroughs, 80% of which went to minority or women-owned small businesses, and 15% to early-stage businesses with less than two years of operations.

### For more information, please contact:

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