

Preparing for Your Call with Our Team



We want to make your journey to securing a loan as straightforward as possible. Here are a few tips to help you prepare for our call so we can understand your needs and support your business effectively.

Success Tip #1: *Know How Much Funding You Need*

Why It Matters:

Understanding the exact amount of funding your nonprofit needs helps us connect you with the right loan options. When you can clearly articulate your funding target, it shows that you have thoughtfully assessed your organization's needs and are prepared to use the funds effectively. Asking for just the right amount ensures that you're not over-burdening your nonprofit with excessive debt, making it easier to manage repayments while staying focused on your mission.

Success Tip #2: *Know How You Will Use the Funds*

Why It Matters:

When you have a clear plan for how the loan will be used—whether to support new community programs, expand outreach efforts, or enhance operational capacity—it helps us better understand your nonprofit's vision. A well-defined use of funds shows the positive impact the loan will have, increasing the likelihood of approval. This also ensures that your nonprofit will be in a strong position to create meaningful outcomes for the communities you serve.

Success Tip #3: *Know How You Will Repay the Loan*

Why It Matters:

Having a solid plan for repayment demonstrates that your nonprofit understands the financial responsibility of borrowing. It reassures lenders that you have assessed your budget and have a strategy to meet repayment obligations, which increases your chances of loan approval. This preparation also gives you the confidence that you can honor the loan commitment without compromising your core services, allowing your nonprofit to thrive and continue making an impact.

Success Tip #1: *Be Open About Your Mission and Goals*

Why It Matters:

Sharing your nonprofit's mission and both short-term and long-term goals helps us understand your impact and how we can support your work effectively. Whether your goal is expanding a key program, launching a new initiative, or building financial stability, clearly communicating these objectives allows us to recommend the best loan options for your nonprofit's needs. Additionally, being open about challenges enables us to identify the right solutions and resources to support your growth.

What to Do:

- Clearly outline your mission, as well as your organization's current priorities and upcoming projects.
- Don't hesitate to mention any barriers you're facing—we're here to help identify ways to overcome these challenges.

Success Tip #2: *Think About Your Ideal Loan*

Why It Matters:

Having a clear idea of what your ideal loan looks like—including the amount of funding, preferred repayment terms, and the intended purpose—helps us make the conversation more focused and productive. This preparation allows us to recommend the most suitable financing options that align with your specific needs, reducing delays and ensuring that your nonprofit can continue to make an impact as efficiently as possible.

What to Do:

- Determine the amount of funding you need and whether you have specific repayment preferences.
- Be ready to describe how the loan will further your mission, whether for program expansion, new initiatives, or improving operational capacity.

Success Tip #3: *Know What to Expect During the Call*

Why It Matters:

Understanding what to expect from our meeting helps ensure that the conversation is smooth, informative, and productive. We want to understand your nonprofit's story, your needs, and how we can best support your mission. By preparing for this discussion, you enable us to efficiently gather the information needed to find a funding solution that's right for you.

What to Expect:

- Discussion of Your Business Needs: We'll ask about your nonprofit's mission, the communities you serve, and how we can help further your impact.
- Review of Eligibility: We'll work together to explore which loan programs might be the best fit for your organization, considering your needs and financial situation.