



How to: Invest with the New Hampshire Community Loan Fund

Thank you for choosing to invest in your neighbors.

Your support is more than a financial commitment – it's a powerful step towards building stronger, more resilient, and locally-focused communities. Once your investment is complete, your money will be driving meaningful change and creating economic opportunities that will last for generations.

To get your investment started, you can reference the investment checklist for a quick overview of the documents we need along with step-by-step instructions on what to expect.

For any questions, please give us a call at **603-224-6669** or email us at invest@communityloanfund.org.

Gratefully,

Your neighbors at the Community Loan Fund

Contents

Investment Checklist	2
Additionally required, when investing on behalf of:	3
Organization	3
Clients (for Investment Advisors).....	3
Trusts.....	3
Congratulations! You're Now an Investor. What's next?	4



Investment Checklist

☐ **Review the Offering Circular**

- [Circular available here.](#)

☐ **Complete Investor Application and Agreement**

- [Application and Agreement available here.](#)
- Please decide on the amount, rate, and term in advance.
- Information on our latest rates can be found in the application and [on our website.](#)

☐ **IRS W-9 form for all investors named in title**

- [Form available here.](#)
- Required for each named investor/owner.

☐ **Direct Deposit Authorization Form**

- [Form available here.](#)
- Required for those requesting interest payment to bank accounts electronically.
- Not required for those electing to compound and accrue interest or receive interest by check.

☐ **Fund your new investment**

- Checks payable to: “New Hampshire Community Loan Fund”
- For ACH/wire transfer instructions, call us at **603-224-6669** or email at invest@communityloanfund.org

☐ **To submit:**

- Send application, forms, and payment to the address listed below or to invest@communityloanfund.org.

New Hampshire Community Loan Fund
Investor Relations
7 Wall Street
Concord, NH 03301



Additionally required, when investing on behalf of:

Organization

- ☐ Beneficial ownership certification.
- ☐ Official signatory resolution or authorization, specifying individuals authorized to sign investment documents.

Clients (for Investment Advisors)

- ☐ Copy of an authorization or agreement which documents the investor's relationship with advisor or advisory firm.
- ☐ Custodian relationship documents (if applicable).
- ☐ Contact information for both clients (investors) and advisors.

Trusts

- ☐ One of the following:
 - Description/title page and signature page(s) of the legal trust document
 - OR-
 - Certification of trust document (preferred).
- ☐ Please include any amendments to the trust documentation that are currently applicable.



New Hampshire
COMMUNITY
LOAN FUND

Congratulations! You're Now an Investor. What's next?

Thank you for investing with us! Your money is now providing economic opportunities for your neighbors.

Here's what you can expect from us:

- a) You will receive a confirmation letter and Promissory Note by mail within a few business days. Please save these for your records.
- b) Each year, you'll receive:
 - A thank you message on the anniversary of your investment.
 - Interest payment (if elected). If you choose to compound and accrue your interest, you'll receive a confirmation letter and check each year.
 - 1099-INT form for your tax records (if receiving interest)
- c) As your investment reaches maturity, you'll receive a letter with instructions on how to receive repayment or reinvest your funds for further impact.

Most of all, you can be proud **that your money is making a difference and is secure**. Since 1983 we've had a **100% investor repayment rate** and a diversified capital stack that protects your investment with us.

Should you have any questions about your investment, or like to explore new opportunities to make an impact, we encourage you to reach out to us by phone at **603-224-6669** or email at **invest@communityloanfund.org**