

Use of BEA Program Award Monies

A. For 2007 (prior year) BEA Program awardees only: Check all that apply to how your institution used its 2007 BEA award monies and the percentage of the award used for each activity.

My institution used our 2007 BEA Award monies to ...

	Percent
1. provide grants, loans or investments to certified CDFIs.	
2. provide grants, loans or investments to other community based organizations.	
3. increase lending or investment activity to low-moderate income persons or businesses.	
4. increase lending or investment activity in underserved communities.	
5. increase the provision of training or technical assistance to CDFIs.	
6. fund general operating costs associated with my institution's community development initiatives.	
7. fund general operating costs of my institution.	
8. Other (detail) _____	
9. Other (detail) _____	
10. N/A - We have not yet used the money.	

B. How does your institution plan to spend its FY 2008 BEA Program Award monies? Check all that apply and indicate the percentage of the award planned for each activity.

My institution intends to use its 2008 BEA Program Award to ...

	Percent
1. provide grants, loans or investments to certified CDFIs.	
2. provide grants, loans or investments to other community based organizations.	
3. increase lending or investment activity to low-moderate income persons or businesses.	
4. increase lending or investment activity in underserved communities.	
5. increase the provision of training or technical assistance to CDFIs.	
6. fund general operating costs associated with my institution's community development initiatives.	
7. fund general operating costs of my institution.	
8. Other (detail) _____	
9. Other (detail) _____	
10. N/A - We do not yet know how this money will be used.	

CDFI-related Activities During the Assessment Period

Check all CDFI-related activities for which your institution reported as Qualifying Activities for a 2008 BEA Award:	What consideration led your institution to engage in this activity? (Enter "CRA Test Credit," "BEA Award Prospect," "Both," "Neither," or "N/A")			Would your institution have engaged in these activities <u>at the same rates and terms</u> without the prospect of receiving a BEA Award? <u>amounts</u> ?			Would it have engaged in these activities <u>in the same dollar amounts</u> ?		
	Yes	No	N/A	Yes	No	N/A	Yes	No	N/A
1. Deposits									
2. Loans									
3. Equity-Like Loans									
4. Equity Investments									
5. Grants									
6. Technical Assistance									

Service and Development Activities During the Assessment Period

A. Check all Service activities for which your institution reported as a Qualifying Activities for a 2008 BEA Award:

1. Deposits	
2. Financial Services	
3. Targeted Financial Services	
4. Targeted Retail Savings/ Investment Products	
5. Community Services	

What consideration led your institution to engage in this activity? (Enter "CRA Test Credit," "BEA Award Prospect," "Both," "Neither," or "N/A")

Would your institution have engaged in these activities at all without the prospect of receiving a BEA Award?

Yes	No	N/A
Yes	No	N/A
Yes	No	N/A

Yes	No	N/A
Yes	No	N/A

Would it have engaged in these activities in the same dollar amounts?

Yes	No	N/A
Yes	No	N/A
Yes	No	N/A

Yes	No	N/A
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B. Check all Development activities for which your institution reported as Qualifying Activities for a 2008 BEA Award:

- 1. Affordable Housing Development and related Project Investments
- 2. Affordable Housing Mortgage Loans
- 3. Education Loans
- 4. Commercial R.E. loans/investments and related Project Investments
- 5. Business loans/investments and related Project Investments
- 6. Home Improvement Loans

What consideration led your institution to engage in this activity? (Enter "CRA Test Credit," "BEA Award Prospect," "Both," "Neither," or "N/A")

Would your institution have engaged in these these activities in your targeted investment areas or for your targeted populations without the prospect of receiving a BEA Award?

Yes	No	N/A
Yes	No	N/A
Yes	No	N/A
Yes	No	N/A
Yes	No	N/A
Yes	No	N/A

Would it have engaged in these activities in the same dollar amounts?

Yes	No	N/A
Yes	No	N/A
Yes	No	N/A
Yes	No	N/A
Yes	No	N/A
Yes	No	N/A

In your institution's CDFI-related activities or Development/Service activities, did the prospect of receiving a 2008 BEA Award prompt your institution to launch any innovative financial products, services or educational programs designed to meet the needs of the traditionally underserved households or communities? **NOTE:** These should be new products or services, not simply existing ones offered at better rates or terms.

Yes No

If yes, please describe these products or services.
