COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Basic Applicant Information

Basic Information

Name	MyTest CDFI	Type of Organization	
DUNS #		Congressional District	
EIN	11-1234567	FY End Date (mm/dd)	

Mailing Address		Shipping Address	
Street 1		Street 1	
Street 2		Street 2	
City		City	
State		State	
Zip Code		Zip Code	

Authorized Representative		Application Contact	
Name		Name	
Phone		Phone	
Fax		Fax	
Email		Email	

Is the Applicant a Subsidiary of any Insured Depository Institution (IDI) or a Depository Institution Holding Company (DIHC) (i.e. does any IDI or DIHC control 25% or more of any class of the Applicant's voting shares or otherwise control, in any manner, the election of a majority of directors of the Applicant)?	
Does the Applicant want to be designated as a Native American CDFI?	
If "Yes", indicate the percentage of activities provided to Native American communities during the most recent fiscal year	

☐	I hereby certify that all of the information provided in connection with the above-named entity's certification as a CDFI is true, accurate and complete. The submission of such information has been duly authorized by the above-named entity's governing body.
Date	

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Affiliate Information

MyTest CDFI (EIN: 11-1234567)

Affiliate Information

Affiliate Name	Affiliate EIN

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Legal Entity

MyTest CDFI (EIN: 11-1234567)

Evidence of Incorporation/Organization/Establishment

Date of Incorporation/Organization/Establishment	

For Regulated Institutions	
Applicant's Federal or State Regulator	
If "Other" - Please List	
Charter Number	
FDIC Insurance Certificate Number	

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Primary Mission

MyTest CDFI (EIN: 11-1234567)

Applicant

	Y/N	Organizational Documents
Indicate the type of board-approved organizational documents that provide evidence of the primary mission of promoting community development of the Applicant.		Articles of Incorporation or organization (signed and filed)
		Bylaws (board-approved)
		Board resolution
		Annual report containing a signed letter from the Board Chairperson
		Board-approved, one-page narrative that specifically states how the organization's collective activities and products evidence the primary mission certification criteria
		Other similar board-approved documents
		NCUA Low-Income designation letter (for credit unions only)

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Primary Mission

MyTest CDFI (EIN: 11-1234567)

Product Table

Product	Product Category	Product Description

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Primary Mission

MyTest CDFI (EIN: 11-1234567)

Affiliate or Subsidiary	Enter EIN Below	Enter Name Below

	Yes / No	Organizational Documents
Indicate the type of board-approved organizational documents that provide evidence of the primary mission of promoting community development of the Applicant's Affiliate or Subsidiary.		Articles of Incorporation or organization (signed and filed)
		Bylaws (board-approved)
		Board resolution
		Annual report containing a signed letter from the Board Chairperson
		Board-approved, one-page narrative that specifically states how the organization's collective activities and products evidence the primary mission certification criteria
		Other similar board-approved documents
		NCUA Low-Income designation letter (for credit unions only)

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Financing Entity

MyTest CDFI (EIN: 11-1234567)

Asset Information Table		Dollar Amount	% of Total Assets
	TOTAL ASSETS	$0	0%
Assets Dedicated to Financing Products and Related Financing Activities			
Cash and Cash Equivalents			
Balance Sheet Account Name			
Balance Sheet Account Name			
Balance Sheet Account Name			
	Sub-Total	$0	0%
Loans Receivable and/or Equity Investments			
Balance Sheet Account Name			
Balance Sheet Account Name			
Balance Sheet Account Name			
	Sub-Total	$0	0%
Loans Purchased from CDFIs			
Balance Sheet Account Name			
Balance Sheet Account Name			
Balance Sheet Account Name			
	Sub-Total	$0	0%
Other Financing Assets			
Balance Sheet Account Name			
Balance Sheet Account Name			
Balance Sheet Account Name			
	Sub-Total	$0	0%

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Financing Entity

MyTest CDFI (EIN: 11-1234567)

Financing Related Activities			
Balance Sheet Account Name			
Balance Sheet Account Name			
Balance Sheet Account Name			
	Sub-Total	$0	0%

Subtotal Assets Dedicated to Financing Products and Related Financing Activities	$0	0%

Development Services Assets			
Balance Sheet Account Name			
Balance Sheet Account Name			
Balance Sheet Account Name			
	Sub-Total	$0	0%

Total Financing Activities Assets	$0	0%

Major Non-Financing Assets			
Balance Sheet Account Name			
Balance Sheet Account Name			
Balance Sheet Account Name			
	Sub-Total	$0	0%

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Financing Entity

MyTest CDFI (EIN: 11-1234567)

Liquid Assets Available for Financing in Next Three Months Cash and Cash Equivalents		
Balance Sheet Account Name		
Balance Sheet Account Name		
Balance Sheet Account Name		
	Sub-Total	$0

Other Financing Assets		
Balance Sheet Account Name		
Balance Sheet Account Name		
Balance Sheet Account Name		
	Sub-Total	$0

Off Balance Sheet and Other Sources		
Other		
Other		
Other		
	Sub-Total	$0

Total Liquid Assets Available for Financing Transactions in Next Three Months	$0
Projected Dollar Amount of Financing Transactions to be made in Next Three Months	
Projected Number of Transactions in Next Three Months	

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Financing Entity

MyTest CDFI (EIN: 11-1234567)

Staff Allocation Table	# of FTEs	% of Total FTEs
Total Number of Full-Time Equivalent (FTE) Staff	0.00	0%
Financing Activities		
FTEs devoted to provision of Financial Products		
FTEs devoted to Financing Related Activities		
Sub-Total for FTEs devoted to Financing Activities	0.00	0%
Development Services		
FTEs devoted to Development Services		
Total FTEs devoted to Financing Activities and Development Services	0.00	0%
Major Non-Financing Activities		
1		
2		
3		
Total Major Non-Financing Activities	0.00	0%

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Target Market - Current Year

MyTest CDFI (EIN: 11-1234567)

Is the Applicant's primary business activity to provide Financial Products to CDFIs and/or emerging CDFIs?	

Target Market Activity for Current Year to Date			Products Categories									
Estimated Values?			Loans		Equity Invests		Loan Purchases		Loan Guarantee		Totals (by TM)	
		Target Market Type	#	$	#	$	#	$	#	$	#	$
Total Activity												
TM 1												
TM 2												
TM 3												
TM 4												
TM 5												
Total TM Activity												
Total TM Activity as % of Total Activity												

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Target Market - Current Year

MyTest CDFI (EIN: 11-1234567)

Target Market Activity for Current Year to Date			Products Categories				
Estimated Values?						All Other Activities	
Total Activity		Target Market Type	Deposits/Shares ($)	# of Members (for CUs)	# of Dev Services	#	$
TM 1							
TM 2							
TM 3							
TM 4							
TM 5							
Total TM Activity							
Total TM Activity as % of Total Activity							

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Target Market - Most Recent FYE

MyTest CDFI (EIN: 11-1234567)

Target Market Activity for Most Recent FYE			Products Categories									
Estimated Values?			Loans		Equity Invests		Loan Purchases		Loan Guarantee		Totals (by TM)	
Total Activity		Target Market Type	#	$	#	$	#	$	#	$	#	$
TM 1												
TM 2												
TM 3												
TM 4												
TM 5												
Total TM Activity												
Total TM Activity as % of Total Activity												

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Target Market - Most Recent FYE

MyTest CDFI (EIN: 11-1234567)

Target Market Activity for Most Recent FYE			Products Categories				
Estimated Values?						All Other Activities	
Total Activity		Target Market Type	Deposits/Shares ($)	# of Members (for CUs)	# of Dev Services	#	$
TM 1							
TM 2							
TM 3							
TM 4							
TM 5							
Total TM Activity							
Total TM Activity as % of Total Activity							

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Accountability

MyTest CDFI (EIN: 11-1234567)

Board Tables

Board Type		Total Target Market Representatives	
Date of Board Composition		Total Board members	

☑ I hereby certify that none none of the board members listed on the table below that are Target Market Representatives, nor any of their family members are principals or staff members of the Applicant CDFI, its subsidiaries, its affiliates, or its investors.

Board Member Name	TM Rep

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Accountability

MyTest CDFI (EIN: 11-1234567)

	Investment Area		
Board Member Name	IA	Type of Representative	Describe how represents of TM

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Accountability

MyTest CDFI (EIN: 11-1234567)

	Low-Income Targeted Population			
Board Member Name	LITP	Type of Representative	Describe how represents of TM	LITP Geographies

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Accountability

MyTest CDFI (EIN: 11-1234567)

		Other Targeted Population			
Board Member Name	OTP	Type of Representative	Describe how represents of TM	OTP Type(s)	OTP Geographies

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Accountability

MyTest CDFI (EIN: 11-1234567)

	Government Representation		
Board Member Name	Gov't Rep or Official	Title and Agency	If special powers or authority, describe

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Accountability

MyTest CDFI (EIN: 11-1234567)

Accountability Methods

Target Market Name (same as map name)	Governing Board	Advisory Board(s)	Other Mechanism(s)	Provide further explanation of Accountability, if necessary

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Accountability

MyTest CDFI (EIN: 11-1234567)

Representative Members

Target Market Name (same as map name)	Governing Board Members	Advisory Board Members

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Development Services

MyTest CDFI (EIN: 11-1234567)

Development Services Table

Development Service Activities (Name & Topic)	Related Products	Format	Provider	Organization Name (if Affiliate or Other)	Est. Clients Per Year (#)	Est % of ***Dev Service*** *Clients* Receiving ***Applicant's*** Financing	Est % of **Dev Service** Clients Receiving ***Applicant's*** Financing in the ***Target Market(s)***	Description of how Development Services activity is provided in conjunction with the Applicant's products

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

CDFI Certification Application

Criteria: Non-Governmental Entity

MyTest CDFI (EIN: 11-1234567)

Non-Governmental Entity

	Y/N
Do one or more government entities or officials control the election or appointment of a majority of the members of the Applicant's board of directors, or control a substantial minority of such directors?	
Does a majority or substantial minority of the Applicant's board of directors consist of government officials (elected, appointed, employees, etc.)?	
Do the Applicant's organizing/establishing documents or by-laws require that a certain number of the Applicant's board of directors be government employee's or elected/appointed government officials?	
Do one or more government entities have veto power over the selection of the Applicant's executive director, CEO, or comparable officer, or specific investment decisions?	
Does any government entity provide more than 50% of the Applicant's operating and/or capital budget?	
If the Applicant receives operating and/or capital funds from a government entity, does that government entity have the ability to control the use of those funds (for example, does a government entity have veto power over the lending/investing transactions made with those funds)?	
Does any government entity manage any aspect of the Applicant's operations?	
Are any of the employee's of the Applicant government employees or employees of an organization controlled by one or more government entities?	
Does any government entity manage any aspect of the Applicant's operations?	
If the Applicant organization is controlled by another entity, is that entity controlled by one or more government entities?	