

California Organized Investment Network (COIN) CDFI Tax Credit Investment Report, by Year, 1997-2016*

2016		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
California Farmlink	Rabobank	1,500,000	300,000
Clearinghouse	CSAA	2,500,000	500,000
Enterprise Community Investment	American Bankers Insurance	219,004	43,801
Enterprise Community Investment	American Security Insurance Co.	109,502	21,900
Enterprise Community Investment	Mutual of Omaha	273,754	54,751
Enterprise Community Investment	United of Omaha	821,263	164,253
Enterprise Community Investment	CSAA	177,177	35,435
Enterprise Community Investment	MetLife	1,203,840	240,768
ICC/Clearinghouse CDFI	Farmers Insurance Exchange	10,000,000	2,000,000
ICC/Capital Impact Partners	Pacific Life Insurance Co.	10,000,000	2,000,000
LIIF	Wells Fargo	1,120,380	224,076
LIIF	JP Morgan Chase	1,120,380	224,076
LISC	Rabobank	2,000,000	400,000
NCCLF	CSAA	2,500,000	500,000
Neighborworks Sacramento	Tri Counties Bank	1,000,000	200,000
RCAC	JP Morgan Chase	1,000,000	200,000
Self Help	C.M. Life Insurance Company	250,000	50,000
Self Help	Mass Mutual Life Insurance Company	250,000	50,000
Self Help	MML Bay Life Insurance Company	250,000	50,000
Self Help	General American Life Ins. Co.	3,500,000	700,000
Self Help	MetLife	7,000,000	1,400,000
Self Help	Metropolitan Tower Life Ins. Co.	500,000	100,000
WNC & Associates	Nationwide Mutual Life Insurance	1,879,723	375,945
WNC & Associates	Nationwide Life Insurance	824,978	164,996
Totals for 2016		24 CDFI Tax Credit Investments \$ 50,000,000	\$ 10,000,000

2015		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
3Core	Golden Valley Bank	100,000	20,000
3Core	Rabobank	500,000	100,000
3Core	Tri Counties Bank	500,000	100,000
ACCION	Pacific Western Bank	250,000	50,000
Bankers Small Business CDC	Banc of California	300,000	60,000
Century Housing Corp	JP Morgan Chase	5,000,000	1,000,000
Century Housing Corp	Pacific Western Bank	2,000,000	400,000
Clearinghouse CDFI	Banc of California	500,000	100,000
Clearinghouse CDFI	Charles Schwab	500,000	100,000
Clearinghouse CDFI	City National Bank	350,000	70,000
Clearinghouse CDFI	Community Bank	500,000	100,000
Clearinghouse CDFI	BBVA Compass Bank	400,000	80,000
Clearinghouse CDFI	Farmers & Merchants Bank of Long Beach	250,000	50,000
Clearinghouse CDFI	First Foundation Bank	500,000	100,000
Clearinghouse CDFI	Pacific Premier	500,000	100,000
Enterprise Community Investment	Boston Private Bank and Trust Co	95,957	19,191
Enterprise Community Investment	California United Bank	218,354	43,671
Enterprise Community Investment	Citizens One CDC	116,193	23,239
Enterprise Community Investment	City National Bank	599,034	119,807
Enterprise Community Investment	Comerica Bank	545,885	109,177
Enterprise Community Investment	CSAA Insurance Group	353,235	70,647
Enterprise Community Investment	CSAA Insurance Group	4,800,102	960,020
Enterprise Community Investment	First Republic Bank	4,574,957	914,991
Enterprise Community Investment	FNBC Leasing Corporation	165,167	33,033
Enterprise Community Investment	Metropolitan Life Insurance Company	687,162	137,432
Enterprise Community Investment	Wilshire Bank	61,963	12,393
Enterprise Community Loan Fund	Metropolitan Life Insurance Company	7,500,000	1,500,000
Enterprise Community Loan Fund	UnitedHealthcare	3,000,000	600,000
Fresno CDFI	Pacific Western Bank	1,000,000	200,000
Genesis LA	Boston Private Bank and Trust Co	500,000	100,000
Genesis LA	Community Bank	250,000	50,000
Genesis LA	Metropolitan Life Insurance Company	3,000,000	600,000
Housing Trust Fund Santa Barbara County	Rabobank	500,000	100,000
Housing Trust Silicon Valley	Wells Fargo	2,000,000	400,000
Local Initiatives Support Corp	City National Bank	300,000	60,000
Local Initiatives Support Corp	JP Morgan Chase	2,000,000	400,000
Local Initiatives Support Corp - Rural	Pacific Western Bank	1,000,000	200,000
Low Income Investment Fund	JP Morgan Chase	6,000,000	1,200,000
Nehemiah	CSAA Insurance Group	3,000,000	600,000
NeighborWorks Sacramento	Rabobank	1,000,000	200,000
NeighborWorks Sacramento	Tri Counties Bank	500,000	100,000
NHS Neighborhood Lending Services	Banc of California	500,000	100,000
NHS of Orange County	Banc of California	500,000	100,000
Opportunity Fund Northern California	Banc of California	500,000	100,000
Pacific Coast Regional SBDC	City National Bank	2,500,000	500,000
Pacific Coast Regional SBDC	Pacific Western Bank	500,000	100,000
Raza Development Fund	Wells Fargo	5,000,000	1,000,000
Rural Community Assistance Corp	Pacific Western Bank	500,000	100,000
Rural Community Assistance Corp	Wells Fargo	1,000,000	200,000
San Luis Obispo County Housing Trust Fund	Founders Community Bank	250,000	50,000
San Luis Obispo County Housing Trust Fund	Heritage Oaks Bank	1,000,000	200,000
San Luis Obispo County Housing Trust Fund	Rabobank	500,000	100,000
Self Help	Private Investor	100,000	20,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	70,000	14,000
Self Help	Private Investor	100,000	20,000
Self Help	Private Investor	225,000	45,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	100,000	20,000
Self Help	Private Investor	60,000	12,000
Valley Economic Development Corp	California United Bank	75,000	15,000
Ventura County CDC	Rabobank	1,000,000	200,000
Women's Economic Ventures	California United Bank	50,000	10,000

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CDFI Tax Credit Investment Report, by Year, 1997-2016*

Women's Economic Ventures	Pacific Western Bank	150,000	30,000
Women's Economic Ventures	Rabobank	250,000	50,000
Totals for 2015		67 CDFI Tax Credit Investments \$ 71,048,009	\$ 14,209,602

2014			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
3CORE	Rabobank	700,000	140,000
3CORE	Tri Counties Bank	250,000	50,000
Clearinghouse CDFI	Pacific Western Bank	250,000	50,000
Clearinghouse CDFI	Sunwest Bank	250,000	50,000
Clearinghouse CDFI	Cathay Bank	1,000,000	200,000
Clearinghouse CDFI	Plaza Bank	250,000	50,000
Clearinghouse CDFI	California Bank and Trust	150,000	30,000
Clearinghouse CDFI	California Bank and Trust	100,000	20,000
Clearinghouse CDFI	Luther Burbank Savings	500,000	100,000
Clearinghouse CDFI	Royal Business Bank	100,000	20,000
Clearinghouse CDFI	Farmers and Merchants Bank	250,000	50,000
Enterprise	CSAA Insurance Group	10,677,288	2,135,458
Enterprise	UnitedHealthcare	11,519,899	2,303,980
Enterprise	CSAA Insurance Group	1,101,412	220,282
Enterprise	Boston Private Bank and Trust Company	137,911	27,582
Enterprise	First Republic Bank	1,154,180	230,836
Enterprise	City National Bank	496,609	99,322
Enterprise	Metropolitan Life Insurance Company	491,733	98,347
Enterprise	Wiltshire Bank	648,157	129,631
Enterprise	Capital One Community Development Corporation	676,411	135,282
Enterprise	Citizens One Community Development Corporation	579,542	115,908
Enterprise	FNBC Leasing Corporation	1,043,848	208,770
Fresno CDFI	Rabobank	1,000,000	200,000
Fresno CDFI	Wells Fargo Bank	500,000	100,000
Fresno CDFI	Premier Valley Bank	500,000	100,000
Genesis LA	Wells Fargo Bank	1,000,000	200,000
Genesis LA	JP Morgan Chase	750,000	150,000
Housing Trust Silicon Valley	Rabobank	2,000,000	400,000
LIIF	JP Morgan Chase	10,000,000	2,000,000
LIIF	MetLife Insurance Company USA	5,000,000	1,000,000
NCCLF	JP Morgan Chase	1,000,000	200,000
NCCLF	General American Life Insurance Company	3,000,000	600,000
NCCLF	Wells Fargo Bank	1,000,000	200,000
NCCLF	Private Investor	50,000	10,000
Nehemiah	Farmers and Merchants Bank	1,250,000	250,000
NHS LA	First General Bank	500,000	100,000
NHS LA	City National Bank	100,000	20,000
NHS LA	California Bank and Trust	250,000	50,000
NWOC	Pacific Western Bank	500,000	100,000
NWOC	Sunwest Bank	100,000	20,000
Opportunity Fund	Pacific Western Bank	300,000	60,000
Opportunity Fund	Wells Fargo Bank	1,000,000	200,000
PCR SBDC	First General Bank	300,000	60,000
ProAmerica Bank	The American Insurance Company	200,000	40,000
ProAmerica Bank	Fireman's Fund Insurance Group	200,000	40,000
ProAmerica Bank	National Surety Corporation	200,000	40,000
ProAmerica Bank	Associated Indemnity Corporation	200,000	40,000
ProAmerica Bank	American Automobile Insurance Company	200,000	40,000
RCAC	Rabobank	2,000,000	400,000
RCAC	JP Morgan Chase	1,000,000	200,000
RCAC	California Bank and Trust	500,000	100,000
Self Help	Private Investor	100,000	20,000
Self Help	Private Investor	150,000	30,000
Self Help	Private Investor	100,000	20,000
Self Help	Private Investor	75,000	15,000
Self Help	Private Investor	150,000	30,000
Self Help	Private Investor	150,000	30,000
Self Help	Private Investor	100,000	20,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	100,000	20,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	50,000	10,000
Self Help	Private Investor	100,000	20,000
SLOCHTF	Rabobank	500,000	100,000
SLOCHTF	Pacific Western Bank	250,000	50,000
Totals for 2014		67 CDFI Tax Credit Investments \$ 68,951,991	\$ 13,790,398

2013			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Corporation for Supportive Housing	MetLife Investors USA Insurance Company	6,000,000	1,200,000
Rural Community Assistance Corporation	California United Bank	1,000,000	200,000
Northern California Community Loan Fund	Private Individual	200,000	40,000
Northern California Community Loan Fund	Private Individual	100,000	20,000
Pacific Coast Reginal Small Business Development Corp	California United Bank	75,000	15,000
Self-Help Federal Credit Union	Private Investor	50,000	10,000
Self-Help Federal Credit Union	Private Investor	50,000	10,000
Self-Help Federal Credit Union	Private Investor	100,000	20,000
Self-Help Federal Credit Union	Private Investor	280,000	56,000
Self-Help Federal Credit Union	Private Investor	118,677	23,735
Self-Help Federal Credit Union	Private Investor	100,000	20,000
Self-Help Federal Credit Union	Private Investor	150,000	30,000
Self-Help Federal Credit Union	Private Investor	70,000	14,000
Self-Help Federal Credit Union	Private Investor	50,000	10,000
Self-Help Federal Credit Union	Private Investor	250,000	50,000
Self-Help Federal Credit Union	Private Investor	100,000	20,000
Self-Help Federal Credit Union	Private Investor	500,000	100,000
Self-Help Federal Credit Union	Private Investor	500,000	100,000

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California Organized Investment Network (COIN)
CDFI Tax Credit Investment Report, by Year, 1997-2016*

Self-Help Federal Credit Union	Private Investor	80,000	16,000
Self-Help Federal Credit Union	Private Investor	226,323	45,265
Totals for 2013		20 CDFI Tax Credit Investments \$ 10,000,000	\$ 2,000,000

2012			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Enterprise Community Investment	AAA	1,816,475	363,295
Enterprise Community Investment	United Health Care	2,748,525	549,705
Faith Based Federal Credit Union	CMFG Life Insurance Company	250,000	50,000
Low Income Investment Fund	Blue Shield of California Life & Health Insurance Company	1,000,000	200,000
Neighborhood Housing Services Orange County	Sunwest Bank	250,000	50,000
Neighborhood National Bank	American Automobile Insurance Company	225,000	45,000
Neighborhood National Bank	Chicago Insurance Company	50,000	10,000
Neighborhood National Bank	CSE Safeguard Insurance Company	250,000	50,000
Neighborhood National Bank	CSE Service Employees Insurance Company	250,000	50,000
Neighborhood National Bank	National Surety Corporation	225,000	45,000
Neighborhood National Bank (NNB)	American Insurance Company	225,000	45,000
Neighborhood National Bank (NNB)	Associated Indemnity Corporation	225,000	45,000
Northeast Community Federal Credit Union	CMFG Life Insurance Company	250,000	50,000
Northeast Community Federal Credit Union	CUMIS Insurance Society, Inc.	250,000	50,000
Northeast Community Federal Credit Union	Private Individual	50,000	10,000
Northern California Community Loan Fund	JPMorgan Chase Bank	600,000	120,000
Pacific Coast Regional Small Business Development Corp	Private Bank of California	250,000	50,000
Rural Community Assistance Corporation	JPMorgan Chase Bank	585,000	117,000
Self-Help Federal Credit Union	CMFG Life Insurance Company	250,000	50,000
Self-Help Federal Credit Union	CUMIS Insurance Society, Inc.	250,000	50,000
Totals for 2012		20 CDFI Tax Credit Investments \$ 10,000,000	\$ 2,000,000

2011			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Clearinghouse CDFI	California Republic Bank	100,000	20,000
Clearinghouse CDFI	First Bank	100,000	20,000
Clearinghouse CDFI	Opus Bank	500,000	100,000
Community Commerce Bank	Massachusetts Mutual Life Insurance Company	100,000	20,000
Community Commerce Bank	C.M. Life Insurance Company	100,000	20,000
Community Commerce Bank	MML Bay Life Insurance Company	100,000	20,000
Impact Community Capital CDE, LLC	Farmers Insurance Exchange	3,500,000	700,000
Impact Community Capital CDE, LLC	Pacific Life Insurance Company	1,000,000	200,000
Impact Community Capital CDE, LLC	State Farm Mutual Automobile Insurance Company	1,000,000	200,000
Impact Community Capital LLC	Farmers Insurance Exchange	3,500,000	700,000
Impact Community Capital LLC	Pacific Life Insurance Company	1,000,000	200,000
Impact Community Capital LLC	State Farm Mutual Automobile Insurance Company	1,000,000	200,000
Low Income Investment Fund	First Republic Bank	4,000,000	800,000
Low Income Investment Fund	MetLife Investors USA Insurance Company	5,000,000	1,000,000
Marin Workforce Housing Trust	Mechanics Bank	200,000	40,000
Neighborhood Housing Services Orange County	First Bank	100,000	20,000
Northern California Community Loan Fund	Private Individual	50,000	10,000
Rural Community Assistance Corporation	JP Morgan Chase	415,000	83,000
Self-Help Federal Credit Union California Division	Private Individual	100,000	20,000
Self-Help Federal Credit Union California Division	Private Individual	175,000	35,000
Self-Help Federal Credit Union California Division	Private Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Private Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Private Individual	85,000	17,000
Self-Help Federal Credit Union California Division	Private Individual	235,000	47,000
Self-Help Federal Credit Union California Division	Private Individual	120,000	24,000
The Housing Trust of Santa Clara County	Silicon Valley Bank	1,000,000	200,000
Totals for 2011		26 CDFI Tax Credit Investments \$ 23,580,000	\$ 4,716,000

2010			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Clearinghouse CDFI	Sunwest Bank	250,000	50,000
Northeast Community Federal Credit Union	Individual	50,000	10,000
Northeast Community Federal Credit Union	Individual	50,000	10,000
Northern California Community Loan Fund	Individual	50,000	10,000
Opportunity Fund Northern California	Silicon Valley Bank	250,000	50,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	80,000	16,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	70,000	14,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	100,000	20,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Totals for 2010		23 CDFI Tax Credit Investments \$ 1,650,000	\$ 330,000

2009			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Clearinghouse CDFI	CapitalSource Bank	500,000	100,000
Clearinghouse CDFI	U.S. Bancorp CDC	50,000	10,000
Clearinghouse CDFI	City National Bank	200,000	40,000
Clearinghouse CDFI	California United Bank	1,000,000	200,000
Faith Based Federal Credit Union	Individual	50,000	10,000
Faith Based Federal Credit Union	Individual	50,000	10,000
Local Initiatives Support Corporation	City National Bank	300,000	60,000
NCB Capital Impact	Metropolitan Life Insurance	5,000,000	1,000,000

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CDFI Tax Credit Investment Report, by Year, 1997-2016*

Neighborhood Housing Services of Orange County	CapitalSource Bank	200,000	40,000
NHS Neighborhood Lending Services, Inc.	City National Bank	100,000	20,000
Northern California Community Loan Fund	Individual	50,000	10,000
Opportunity Fund Northern California	CapitalSource Bank	300,000	60,000
Opportunity Fund Northern California	Heritage Bank of Commerce	50,000	10,000
Rural Community Assistance Corporation	California Bank & Trust	500,000	100,000
Santa Cruz Community Credit Union	California Mutual Insurance Co	100,000	20,000
Self-Help Federal Credit Union California Division	Individual	100,000	20,000
Self-Help Federal Credit Union California Division	Individual	200,000	40,000
Self-Help Federal Credit Union California Division	Individual	100,000	20,000
Self-Help Federal Credit Union California Division	Individual	100,000	20,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
Self-Help Federal Credit Union California Division	Individual	150,000	30,000
Self-Help Federal Credit Union California Division	Individual	50,000	10,000
SoCal Reinvestment CDFI	CapitalSource Bank	50,000	10,000
Totals for 2009		23 CDFI Tax Credit Investments \$ 9,250,000	\$ 1,850,000

2008		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
Clearinghouse CDFI	CapitalSource Bank	\$ 100,000	\$ 20,000
Clearinghouse CDFI	CapitalSource Bank	100,000	20,000
Clearinghouse CDFI	CapitalSource Bank	100,000	20,000
LA Neighborhood Housing Services	CapitalSource Bank	100,000	20,000
LA Neighborhood Housing Services	CapitalSource Bank	100,000	20,000
Low Income Investment Fund	Wachovia Bank	1,500,000	300,000
Low Income Investment Fund	Metropolitan Life Insurance	3,400,000	680,000
Northern California Community Loan Fund	Private Individual	75,000	15,000
Neighborhood Housing Services Orange County	CapitalSource Bank	100,000	20,000
Opportunity Fund	CapitalSource Bank	100,000	20,000
Self-Help Federal Credit Union-CA Division	Private Individual	50,000	10,000
Self-Help Federal Credit Union-CA Division	U.S. Bancorp Community Dev. Corp	100,000	20,000
CDC Small Business Finance	CapitalSource Bank	100,000	20,000
CDC Small Business Finance	CapitalSource Bank	100,000	20,000
SoCal Reinvestment CDFI	CapitalSource Bank	100,000	20,000
SoCal Reinvestment CDFI	CapitalSource Bank	100,000	20,000
SoCal Reinvestment CDFI	CapitalSource Bank	100,000	20,000
SoCal Reinvestment CDFI	CapitalSource Bank	100,000	20,000
Totals for 2008		18 CDFI Tax Credit Investments \$ 6,425,000	\$ 1,285,000

2007		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
Clearinghouse CDFI	Wachovia	\$ 200,000	\$ 40,000
Community Commerce Bank	American Auto Insurance Co.	100,000	20,000
Community Commerce Bank	Chicago Insurance Company	100,000	20,000
Community Commerce Bank	National Surety Corporation	100,000	20,000
Community Commerce Bank	Civil Service Employee Ins. Co.	50,000	10,000
Community Commerce Bank	CSE Safeguard Insurance Co.	50,000	10,000
Community Financial Resource Center	First Commercial Bank	50,000	10,000
Community Financial Resource Center	Nara Bank	100,000	20,000
Low Income Investment Fund	Citicorp USA, Inc.	4,000,000	800,000
Mission Community Bank	American Auto Insurance Co.	100,000	20,000
Mission Community Bank	Chicago Insurance Company	100,000	20,000
Mission Community Bank	National Surety Corporation	100,000	20,000
Neighborhood Housing Services of Orange County	Washington Mutual Bank	1,000,000	200,000
Neighborhood National Bank	American Auto Insurance Co.	100,000	20,000
Northeast Community Federal Credit Union	Cathay Bank	100,000	20,000
Northeast Community Federal Credit Union	Western Financial Bank	100,000	20,000
Northern California Community Loan Fund	United Commercial Bank	250,000	50,000
OBDC Small Business Finance	The Mechanics Bank	500,000	100,000
Pacific Coast Regional Small Business Development Corp.	Alliance Bank	395,000	79,000
Pacific Coast Regional Small Business Development Corp.	Washington Mutual Bank	1,500,000	300,000
San Luis Obispo County Housing Trust Fund	Mid-State Bank & Trust	100,000	20,000
Totals for 2007		21 CDFI Tax Credit Investments \$ 9,095,000	\$ 1,819,000

2006		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
Clearinghouse CDFI	First Bank & Trust	\$ 100,000	\$ 20,000
Clearinghouse CDFI	Fremont Investment & Loan	100,000	20,000
Clearinghouse CDFI	Fremont Investment & Loan	100,000	20,000
Community Commerce Bank	C.M. Life Insurance Company	100,000	20,000
Community Commerce Bank	Massachusetts Mutual Life Insurance Company	100,000	20,000
Community Commerce Bank	MML Bay State Life Insurance Company	100,000	20,000
Fund for Children and Communities, LLC	21st Century Insurance Company	329,643	65,929
Fund for Children and Communities, LLC	Allstate Insurance Company	384,623	76,925
Fund for Children and Communities, LLC	Allstate Insurance Company	239,765	47,953
Fund for Children and Communities, LLC	Farmers Insurance Exchange	384,623	76,925
Fund for Children and Communities, LLC	Farmers Insurance Exchange	239,765	47,953
Fund for Children and Communities, LLC	Nationwide Mutual Insurance Company	384,623	76,925
Fund for Children and Communities, LLC	Nationwide Mutual Insurance Company	445,257	89,051
Fund for Children and Communities, LLC	Pacific Life Insurance Company	384,623	76,925
Fund for Children and Communities, LLC	Pacific Life Insurance Company	239,765	47,953
Fund for Children and Communities, LLC	Safeco Insurance Company of America	329,643	65,929
Fund for Children and Communities, LLC	Safeco Insurance Company of America	205,492	41,098
Fund for Children and Communities, LLC	State Farm Mutual Automobile Insurance Company	384,623	76,925
Fund for Children and Communities, LLC	State Farm Mutual Automobile Insurance Company	239,765	47,953
Lenders for Community Development	Fremont Investment & Loan	100,000	20,000
Lenders for Community Development	Fremont Investment & Loan	100,000	20,000
Lenders for Community Development	Fremont Investment & Loan	100,000	20,000
Low Income Investment Fund	Metropolitan Life Insurance Company	3,000,000	600,000
NHS Lending-Los Angeles	Vineyard Bank	250,000	50,000
NHS of Orange County	First Bank	100,000	20,000
NHS of Orange County	Fremont Investment & Loan	100,000	20,000
NHS of Orange County	Fremont Investment & Loan	100,000	20,000
Northern California Community Loan Fund	private individual	50,000	10,000
Northern California Community Loan Fund	Wells Fargo Bank Comm Dev Corp	750,000	150,000

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Rural Community Assistance Corp (RCAC)	Washington Mutual Bank	376,165	75,233
SoCal Reinvestment CDFI	Fremont Investment & Loan	100,000	20,000
SoCal Reinvestment CDFI	Fremont Investment & Loan	100,000	20,000
Totals for 2006		32 CDFI Tax Credit Investments \$ 10,018,372	\$ 2,003,674

2005		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
Asian Pacific Revolving Loan Fund	First Republic Bank	\$ 1,800,000	\$ 360,000
Bridge Housing Corporation	Citibank (West), FSB	8,000,000	1,600,000
Community Commerce Bank	Associated Indemnity Corporation	100,000	20,000
Community Commerce Bank	Fireman's Fund Insurance Company	100,000	20,000
Mission Community Bank	American Insurance Company	100,000	20,000
Mission Community Bank	Associated Indemnity Corporation	100,000	20,000
Mission Community Bank	Firemen's Fund Insurance Company	100,000	20,000
Neighborhood National Bank	American Insurance Company	100,000	20,000
Neighborhood National Bank	Associated Indemnity Corporation	100,000	20,000
Neighborhood National Bank	Firemen's Fund Insurance Company	100,000	20,000
Pacific Coast Regional SBDC	Comerica Bank	50,000	10,000
Totals for 2005		11 CDFI Tax Credit Investments \$ 10,650,000	\$ 2,130,000

2004		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
California Environmental Redev Fund	United Commercial Bank	\$ 91,251	\$ 18,250
California Environmental Redev Fund	United Commercial Bank	911,535	182,307
Clearinghouse CDFI	California Bank and Trust	200,000	40,000
Clearinghouse CDFI	City National Bank	200,000	40,000
Clearinghouse NMTC (Sub 2), LLC	Commercial Capital Bank, FSB	10,000,000	2,000,000
Community Financial Resource Center	Cathay Bank	100,000	20,000
Inglewood NHS	City National Bank	100,000	20,000
Inglewood NHS	Western Financial Bank	100,000	20,000
Inglewood NHS	Western Financial Bank	50,000	10,000
Lenders for Community Development	Heritage Bank of Commerce	150,000	30,000
Lenders for Community Development	Heritage Bank of Commerce	50,000	10,000
Lenders for Community Development	The Summit National Bank	50,000	10,000
Local Initiatives Support Corp (LISC)	City National Bank	300,000	60,000
Neighborhood Bancorp	San Diego National Bank	200,010	40,002
Neighborhood Bancorp	Union Bank of California	500,000	100,000
Neighborhood Bancorp	Wells Fargo Bank, NA	1,000,000	200,000
Neighborhood Bancorp	Zenith Insurance Company	255,005	51,001
NHS Lending-Los Angeles	City National Bank	100,000	20,000
NHS Lending-Los Angeles	Western Financial Bank	100,000	20,000
NHS Lending-Los Angeles	Western Financial Bank	250,000	50,000
NHS of Orange County	First Federal Bank of California	100,000	20,000
NHS of Orange County	Western Financial Bank	50,000	10,000
NHS of Orange County	Western Financial Bank	300,000	60,000
Northeast Community Federal Credit Union	HSBC Bank USA, NA	100,000	20,000
People's Community Partnership Federal Credit Union	Private Individual	50,000	10,000
Rural Community Assistance Corp. (RCAC)	California Bank & Trust	100,000	20,000
Rural Community Assistance Corp. (RCAC)	Washington Mutual Comm. Dev.	848,827	169,765
Santa Cruz Community Credit Union	Mid-State Mutual Insurance Company	100,000	20,000
TELACU Community Capital	Nara Bank	100,000	20,000
TELACU Community Capital	Pacific Western National Bank	100,000	20,000
TELACU Community Capital	Wiltshire State Bank	100,000	20,000
Totals for 2004		31 CDFI Tax Credit Investments \$ 16,656,628	\$ 3,331,325

2003		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
California Environmental Redev Fund	United Commercial Bank	\$ 300,000	\$ 60,000
Clearinghouse CDFI	Fremont Investment & Loan	100,000	20,000
Clearinghouse CDFI	Fremont Investment & Loan	100,000	20,000
Clearinghouse CDFI	Fremont Investment & Loan	100,000	20,000
Clearinghouse CDFI	Fremont Investment & Loan	200,000	40,000
Community Commerce Bank	Mission Community Bank	100,000	20,000
Community Financial Resource Center	Washington Mutual Comm Dev. Corp	500,000	100,000
Impact Community Capital LLC	First Colony Life Insurance Company	204,512	40,902
Impact Community Capital LLC	General Electric Capital Assurance Company	370,488	74,098
Lenders for Community Development	Fremont Investment & Loan	100,000	20,000
Mission Community Bank	Private Individual	100,000	20,000
Neighborhood National Bank	Mission Community Bancorp	250,000	50,000
NHS Lending-Los Angeles	Fremont Investment & Loan	100,000	20,000
NHS Lending-Los Angeles	Fremont Investment & Loan	100,000	20,000
NHS of Orange County	Fremont Investment & Loan	100,000	20,000
Pacific Coast Regional SBDC	HSBC Bank USA	500,000	100,000
People's Community Partnership Federal Credit Union	Bank of the West	100,000	20,000
People's Community Partnership Federal Credit Union	HSBC Bank USA	50,000	10,000
People's Community Partnership Federal Credit Union	Mission Community Bank	100,000	20,000
People's Community Partnership Federal Credit Union	Private Individual	50,000	10,000
People's Community Partnership Federal Credit Union	US Bancorp Community Dev Corp	100,000	20,000
People's Community Partnership Federal Credit Union	Wells Fargo Bank, NA	100,000	20,000
Santa Cruz Community Credit Union	Mission Community Bank	100,000	20,000
Totals for 2003		23 CDFI Tax Credit Investments \$ 3,825,000	\$ 765,000

2002		Investment	Tax Credit
Name of CDFI	Investor	Amount	Amount
Clearinghouse CDFI	Western Financial Bank	\$ 100,000	\$ 20,000
Clearinghouse CDFI	Western Financial Bank	200,000	40,000
Local Initiatives Support Corp (LISC)	Metropolitan Life Insurance Company	1,000,000	200,000
Low Income Investment Fund	California Federal Bank, FSB	5,000,000	1,000,000
Low Income Investment Fund	Metropolitan Life Insurance Company	1,000,000	200,000
Northeast Community Federal Credit Union	Cathay Bank	100,000	20,000
Northeast Community Federal Credit Union	Wells Fargo Bank, N.A.	100,000	20,000
Northeast Community Federal Credit Union	Western Financial Bank	100,000	20,000
Northern California Community Loan Fund	Wells Fargo Bank, N.A.	750,000	150,000
Pacific Coast Regional SBDC	Wells Fargo Bank Community Dev. Corp.	500,000	100,000
Totals for 2002		10 CDFI Tax Credit Investments \$ 8,850,000	\$ 1,770,000

* Insurers Were Not Eligible for the Tax Credits Until 2000

California Organized Investment Network (COIN) CDFI Tax Credit Investment Report, by Year, 1997-2016*

2001			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Asian Pacific Revolving Loan Fund	Wells Fargo Bank, N.A.	\$ 500,000	\$ 100,000
Community Bank of the Bay	Civil Service Employees Insurance Company	50,000	10,000
Community Financial Resource Center	Wells Fargo Bank, N.A.	75,000	15,000
Impact Community Capital LLC	Nationwide Mutual Insurance Company	402,466	80,493
Impact Community Capital LLC	State Farm Mutual Automobile Insurance Company	171,361	34,272
Low Income Investment Fund	Bank of America	5,000,000	1,000,000
Neighborhood Bancorp	First Republic Bank	100,000	20,000
Northeast Community Federal Credit Union	CSE Safeguard Insurance Company	50,000	10,000
Northern California Community Loan Fund	Bank of America	1,000,000	200,000
Rural Community Assistance Corp. (RCAC)	Bank of America	2,500,000	500,000
Rural Community Assistance Corp. (RCAC)	Washington Mutual Comm. Dev.	151,173	30,235
Totals for 2001		11 CDFI Tax Credit Investments \$ 10,000,000	\$ 2,000,000

2000			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Bridge Housing Corporation	Bank of America	\$ 3,000,000	\$ 600,000
Clearinghouse CDFI	Farmers & Merchants Bank	200,000	40,000
Clearinghouse CDFI	General Bank	200,000	40,000
Clearinghouse CDFI	Jackson Federal Bank	200,000	40,000
Clearinghouse CDFI	Pacific Century Bank	200,000	40,000
Clearinghouse CDFI	Peoples Bank of California	200,000	40,000
Clearinghouse CDFI	United Commercial Bank	200,000	40,000
Clearinghouse CDFI	US Bank	200,000	40,000
Clearinghouse CDFI	Washington Mutual Bank	300,000	60,000
Clearinghouse CDFI	Western Financial Bank	200,000	40,000
Community Bank of the Bay	C.M. Life Insurance Company	100,000	20,000
Community Bank of the Bay	Massachusetts Mutual Life Insurance Company	100,000	20,000
Community Bank of the Bay	MML Bay State Life Insurance Company	100,000	20,000
Community Bank of the Bay	PMI Mortgage Insurance Co.	100,000	20,000
Community Commerce Bank	PMI Mortgage Insurance Co.	100,000	20,000
Impact Community Capital LLC	21st Century Insurance Company	168,905	33,781
Impact Community Capital LLC	Allstate Insurance Company	197,076	39,415
Impact Community Capital LLC	Farmers Insurance Exchange	197,076	39,415
Impact Community Capital LLC	Pacific Life Insurance Company	197,076	39,415
Impact Community Capital LLC	PMI Mortgage Insurance Co.	56,310	11,262
Impact Community Capital LLC	Safeco Insurance Company of America	168,905	33,781
Low Income Investment Fund	Mechanics Bank	1,000,000	200,000
Neighborhood National Bank	Eldorado Bank (now Calif Bank & Trust)	100,000	20,000
Neighborhood National Bank	PMI Mortgage Insurance Co.	100,000	20,000
Northeast Community Federal Credit Union	PMI Mortgage Insurance Co.	100,000	20,000
Northern California Community Loan Fund	Private Individual	80,000	16,000
Pacific Coast Regional SBDC	Washington Mutual Bank	1,000,000	200,000
Totals for 2000		27 CDFI Tax Credit Investments \$ 8,765,348	\$ 1,753,070

1999			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Clearinghouse CDFI	City National Bank	200,000	40,000
Clearinghouse CDFI	Eldorado Bank (now Calif Bank & Trust)	100,000	20,000
Clearinghouse CDFI	Fremont Investment & Loan	200,000	40,000
Clearinghouse CDFI	Imperial Bank	100,000	20,000
Clearinghouse CDFI	Pacific Century Bank	50,000	10,000
Clearinghouse CDFI	Union Bank of California	500,000	100,000
Comunidades Federal Credit Union	Pacific Century Bank	50,000	10,000
Fame Renaissance Equity Fund	Pacific Century Bank	50,000	10,000
Inglewood NHS	City National Bank	100,000	20,000
Lenders for Community Development	Cupertino Bank	125,000	25,000
Lenders for Community Development	General Bank	100,000	20,000
Lenders for Community Development	Heritage Bank of Commerce	50,000	10,000
Lenders for Community Development	Heritage Bank of Commerce	150,000	30,000
Lenders for Community Development	Mid-Peninsula Bank	125,000	25,000
Lenders for Community Development	The Summit National Bank	50,000	10,000
Local Initiatives Support Corp (LISC)	City National Bank	300,000	60,000
Local Initiatives Support Corp (LISC)	Pacific Century Bank	50,000	10,000
NHS Lending-Los Angeles	City National Bank	100,000	20,000
NHS Lending-Los Angeles	Republic Bank California N.A.	50,000	10,000
Northern California Community Loan Fund	California Federal Bank, FSB	200,000	40,000
Northern California Community Loan Fund	Private Individual	100,000	20,000
Rural Community Assistance Corp. (RCAC)	Eldorado Bank (now Calif Bank & Trust)	100,000	20,000
Totals for 1999		22 CDFI Tax Credit Investments \$ 2,850,000	\$ 570,000

1998			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Clearinghouse CDFI	Chase Manhattan Bank	100,000	20,000
Clearinghouse CDFI	Eldorado Bank (now Calif Bank & Trust)	100,000	20,000
Clearinghouse CDFI	Fremont Investment & Loan	100,000	20,000
Fame Renaissance Equity Fund	Private Individual	250,000	50,000
Fame Renaissance Equity Fund	Wells Fargo Bank, N.A.	2,500,000	500,000
Low Income Investment Fund	Provident Financial Corp.	133,333	26,667
Totals for 1998		6 CDFI Tax Credit Investments \$ 3,183,333	\$ 636,667

1997			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Low Income Investment Fund	Bank of America	\$ 255,004	\$ 51,001
Totals for 1997		1 CDFI Tax Credit Investments \$ 255,004	\$ 51,001

Totals for 1997-2016			
Name of CDFI	Investor	Investment Amount	Tax Credit Amount
Totals for 1997-2016		\$ 335,053,685	\$ 67,010,736

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