

## CLIMBER Fund Statement of Services

July – December 2024

### Consulting Services

- In person visits with small businesses
- Promote CLIMBER at Public speaking events: (evenings/weekends)
- Campaigns: Email campaign, text messaging campaign, phone campaign
- Attend networking events representing the CLIMBER Fund
- Participate in business expo's/community events to engage small business owners
- Present at various virtual events hosted by the City of Denver, CDOT, RTD etc.
- Promote the CLIMBER Fund to a variety of membership driven organizations: Hispanic Chamber of Commerce, Hispanic Contractors of CO, Latino Chamber of Pueblo, Boulder Latino Chamber of Commerce, Asian Chamber of Commerce, Black Chamber of Commerce etc.
- Conduct survey to obtain the necessary documentation to qualify small businesses
- Assist small businesses (English/Spanish) on loan preparedness to include reviewing the following: Business Tax Returns (Business/Personal), Financial Statement P&L, Balance Sheet, Personal Financial Statement, Personal Credit Score Check, Use of Funds, Good Standings with SOS, Explanation of use of funds, Articles of Inc. Articles of Org. Op. Agreement, Bylaws
- Connect small businesses to the various lenders that are best suited for their loan needs
- Follow up with lender to ensure adequate response time
- Follow up with small business to ensure they are providing the necessary documentation for their loan application
- Update Director of the CLIMBER Fund on a quarterly basis
- Work with CHFA to ensure correct messaging of program
- Promote the CLIMBER Fund on all of Apex's social media and outbound correspondence
- Track all correspondence with small businesses via Salesforce