LiftFund

DREAM IT. FUND IT.

2025

ANNUAL REPORT

Expanding access.
Accelerating recovery.

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LiftFund

DREAM IT. FUND IT.



OUR MISSION

To transform lives by offering financial resources and support services designed to promote economic empowerment and uplift entrepreneurs, small businesses, their neighbors and surrounding communities. **This is the role that LiftFund will play to make its vision a reality.**

OUR VISION

To be a driving force in transforming communities into vibrant hubs of opportunity, resilience, and economic independence. **This is the future that LiftFund imagines for the communities it serves.**

2025 IMPACT SNAPSHOT

In 2025, LiftFund expanded its reach while responding to extraordinary needs in communities affected by disaster. Advancing economic recovery took center stage as we rose to the challenge of rebuilding after wildfires in L.A. and recovering after catastrophic flooding in the Texas Hill Country.

Alongside disaster response, LiftFund continued helping entrepreneurs launch, stabilize, and grow their businesses by expanding access to affordable capital. We deployed $7.5 million in reduced interest loans, expanding access to affordable capital for business owners in need. 2025 also marked a major milestone: LiftFund is now ready to serve small businesses in all 50 states. This expansion of our geographic footprint means we're able to close funding gaps for more communities than ever before. Our efforts gained national attention from outlets like Inc. Magazine and The Chronicle of Philanthropy, underscoring the growing impact of our work and the importance of investing in small businesses nationwide.

The numbers tell a powerful story, but they represent something even greater. Behind every number is a business, a family, a job, and a stronger community.

TOTAL LENDING
$85.8 million

DISASTER RELIEF PERFORMANCE
655 small businesses assisted

NUMBER OF LOANS
808

BUSINESS SUPPORT HOURS
5,016

JOBS CREATED/RETAINED
6,880

GEOGRAPHIC FOOTPRINT/EXPANSION
ready to serve in all **50 states**

GRANTS ADMINISTERED
655

Fueling Resilience Through **Targeted Support**

Not all funding needs fit neatly in a box. Through strong partnerships with local governments, philanthropists, and community organizations, our special programs open unique opportunities to provide crucial funding when business owners need it most.

LiftFund has emerged as a leader in disaster support and economic resilience by creating more pathways to capital. Our low- and zero-interest rate loans, small business grants, and flexible financing set business owners up for long-term success.

At their core, these special programs are about people. We're helping business owners keep their doors open and stay positioned for growth. We're providing hope for the people and families who live in these communities by turning moments of hardship into opportunities for recovery, resilience, and renewed growth.

"Thankfully, LiftFund had plenty of mentors who could help me through this process and help me learn how to better operate my business. **Being able to call on them when I need help, month to month and year to year, has been a game changer."**

ALEX MCCULLY, HOP'N GO TOURS, LLC



INTEREST BUYDOWN PROGRAMS

LiftFund's Interest Rate Buydown Programs have significantly reduced the cost of borrowing.

Affordable capital creates a more manageable path to success and allows entrepreneurs to focus on building their business, supporting their employees, and strengthening communities.

It allows business owners to invest money back into their business. These programs can be the difference between moving forward or standing still.

2025 OUTCOMES

FUNDING FACILITATED
$7.5 million

LOANS PROVIDED
196

DISASTER RELIEF

Disasters can strike at any time, leaving small businesses vulnerable, and the consequences echo far beyond a single storefront. Without immediate support, many small businesses never reopen, resulting in lost jobs, reduced local tax revenue, and weakened community infrastructure.

With 30 years of experience, stringent fraud prevention measures, and more than 50 successfully deployed recovery programs, LiftFund delivers rapid, responsible support when it matters most. From natural disasters to prolonged road construction, we help stabilize businesses, protect livelihoods, and preserve the economic foundation communities depend on.

Quick, flexible, affordable capital helps businesses reopen, employees keep their jobs, and the community retains essential services. We're creating a stabilizing ripple effect that offers long-term protection for local economies and accelerates recovery.

Did you know? After a disaster, an estimated **40%** of small businesses never reopen, and another **25%** close within one year.*

Disaster and disruption relief efforts do more than help businesses recover in the short term. They anchor entire communities in moments of uncertainty.

KEY PROGRAMS IN 2025

- LA Wildfire Small Business Relief Grant
- Steadfast LA Small Business Initiative
- Hill Country Disaster Relief and Recovery Programs
- Laredo Outdoor Improvement Program
- San Angelo Area Disaster Relief Fund
- Corpus Christi Drought Resilient Workforce Stability Grant Program
- City of San Antonio 2025 Construction Grants

GRANTS FACILITATED
$6.4 million

SMALL BUSINESSES ASSISTED
655



For more than a century, Waltonia has been a part of my family's story. When the July 4th floods destroyed much of the camp, it felt like losing a piece of our family history. Thanks to the support from the Hill Country Disaster Relief Grant through LiftFund, we've started rebuilding, one cabin at a time. We hope to welcome families back in 2026 and keep the Waltonia legacy alive.

AMANDA, WALTONIA LODGE

*U.S. Small Business Administration and Ready.gov

Business success stories are built through a combination of **affordable funding** and **full-spectrum business support**.

That's why, in addition to dollars, we provide entrepreneurs with the tools, knowledge and confidence to grow at every stage of their journey.

Through free workshops, webinars, accelerator programs, and on-demand resources, we're making sure small business owners are equipped with the practical skills they need for financial management, marketing, credit, government contracting and digital tools.

We also build supportive peer networks and keep expert advisors on hand to help.

To understand the impact of our Business Resource Hub, it's best to hear from the people who use it every day.

Business owners are building confidence, strengthening skills and moving forward with greater clarity through some of our most popular programs.

HUB 101: TEXAS HUB CERTIFICATION SIMPLIFIED

"Information was intriguing and interactive based on relevancy of what is needed to be successful now."

BRITTENY PETTY

CERTIFIED TO SHINE: YOUR GUIDE TO TEXAS RISING STAR CERTIFICATION (HOUSTON)

"It was very helpful information for those who would love to open their own business."

BRIANNA HUTCHINS



IN 2025, WE SUCCESSFULLY LAUNCHED

197
WORKSHOPS

5,016
TOTAL HOURS OF BUSINESS SUPPORT FOR ENTREPRENEURS

BUSINESS RESOURCE HUB

Our Business Support team served **2,685 unique participants** and offered individualized guidance on business growth and development.

This integrated approach, blending structured training with one-on-one assistance, demonstrates a strong commitment to meeting entrepreneurs where they are and providing tailored, high-quality support. With consistent programming throughout the year, this work reflects a meaningful and sustained impact on the small business ecosystem, with continued opportunity to expand reach and deepen engagement.

All this work translates into tangible outcomes, supporting revenue growth and enabling entrepreneurs to create and retain jobs, all while strengthening the long-term stability of their businesses. As participants apply what they've learned, they're better positioned to adapt, scale, and contribute to a more resilient local economy.

CLIENT MARKETPLACE

Our Client Marketplace puts our small business clients in the spotlight, **connecting them with new customers** while **actively driving traffic to their products and services**.

Extra visibility, especially during the holidays, creates opportunity for increased sales and community engagement.

88 **CLIENTS ADDED IN 2025**

1,141 **TOTAL CLIENTS LISTED**

2025 BY THE NUMBERS

FUNDING FACILITATED
$92.2 million

- 6,880 JOBS CREATED /RETAINED
- 5,016 BUSINESS SUPPORT HOURS

SMALL BUSINESS LENDING
$36.0 million

- 766 LOANS PROVIDED
- 4,451 JOBS CREATED & RETAINED

504 LENDING
$49.8 million

- 42 LOANS PROVIDED
- 320 JOBS CREATED & RETAINED

GRANT FUNDING
$6.4 million

- 655 GRANTS PROVIDED
- 2,109 JOBS CREATED & RETAINED

LENDING CLIENT PROFILE

VETERANS & SPOUSES
$7 million

STARTUP LOANS
$6.6 million

MICROLOANS
$20.4 million
$46,979 average microloan amount



FINANCIALS

	2025	2024
Total Public Support & Revenue	$30,110,957	$22,182,515
Total Expenses	$27,684,307	$27,107,484
Change in Net Assets	$2,426,650	($4,924,969)
Total Assets	$116,870,475	$102,981,540
Total Liabilities	$76,269,453	$63,807,168
Total Net Assets	$40,601,022	$39,174,372
Total Liabilities and Net Assets	$116,870,475	$102,981,540

PORTFOLIO & CLIENT INSIGHTS

LiftFund Owned	$69,964,250	$67,664,439
LiftFund Servicing Portion	$20,504,794	$16,568,577
Portfolio	$90,469,044	$84,233,016
Active Clients	2,540	2,608
Average Loan Size	$35,618	$32,298
Delinquency Rate	5.52%	4.49%
Gross Losses	5.50%	4.15%

MAKING HEADLINES

LiftFund gained national attention in 2025 for the work we're doing alongside our partners and entrepreneurs across the country.

Media coverage means more than getting our name in the press. It's about shining a light on the small businesses we support and the sponsors and donors who help us make a difference. These stories help amplify LiftFund's mission by building credibility and trust with new audiences, raising awareness of the importance of affordable access to capital, and turning our mission into a movement.

Inc.

How Extreme Weather Puts Small Businesses on the Brink

Extreme weather is becoming a growing threat to small businesses, disrupting operations, driving up costs, and leaving many owners one disaster away from shutting down.

TPR

San Antonio Nonprofit LiftFund Offers Grants and Interest-Free Loans to Small Businesses Impacted by Floods

The funding aims to give local businesses immediate relief and a path toward recovery after devastating flood damage impacted communities across the region.

The Chronicle of Philanthropy

To Help Small Businesses Recover From the L.A. Fires, Invest in Community Lenders

Community lenders can deliver disaster assistance to small businesses faster than traditional government programs, but need greater philanthropic investment to meet demand and help local businesses recover and rebuild.

AP

As small businesses face fire devastation and try to get back on their feet, a variety of aid exists

As wildfire recovery begins, small business owners face the challenge of rebuilding while navigating loans, grants, and other financial assistance programs designed to help them recover and reopen.

ACBJ

How to Spot Predatory Small-Business Loans

Predatory lenders often target struggling small businesses with high-interest loans and misleading terms that can deepen financial hardship instead of solving it.

In 2025, LiftFund appeared in **1,717 news stories**, nearly double the prior year, with **60%** of coverage in leading national, regional, or global outlets and an estimated **potential reach of 5.3 billion**.

IMPACT AWARDS

San Antonio Business Journal's 2025 Impact Awards to honor community changemakers

The award recognizes organizations making a significant impact in their communities through leadership, philanthropy, and meaningful contributions to economic and social progress.

OUTSTANDING CDFI AWARD

Opportunity Finance Network Recognizes Outstanding Industry Leadership at OFN41

The national recognition honors leaders and organizations advancing economic opportunity and community development through innovation, resilience, and expanded access to capital.

Evergreen Bilingual Learning Center

ARLINGTON IBD

The City of Arlington helped us launch a 0% interest loan program to help local entrepreneurs get up to $100,000 for inventory, new equipment and working capital.



"Those funds actually helped us cover expenses for the first three to six months. **It was amazing and great timing.**"

JOSE DELGADO CAMPOS, EVERGREEN BILINGUAL LEARNING CENTER

Allosense Inc.

CITY OF SAN ANTONIO IBD

Since 2016, the City of San Antonio has partnered with LiftFund to deliver more than $13.1 million in funding to more than 400 local entrepreneurs. These 0% interest loans have given hundreds of business owners the chance to start, sustain, and grow their businesses.



"Investing in the right equipment gave us the ability to build for customers we couldn't serve before."

ROMAN SANDOVAL, ALLOSENSE INC.

The Schoolhouse Cottage, LLC

HIGH ENERGY EFFICIENCY TRANSFORMATION (HEET) LOAN

Our HEET loan program helps small businesses cut costs and boost efficiency by retrofitting their buildings with energy-efficient improvements and/or replacing equipment with energy-efficient models.

"I saw the impact of the upgrades immediately. **Our utility bills dropped significantly,** and the power no longer went out every time the wind blew."

CALLIE WHEAT, THE SCHOOLHOUSE COTTAGE



Aroma D' Liz Candle Co.

MCALLEN IBD

As small business owners in McAllen faced funding gaps, LiftFund's Interest Rate Buydown program offered 0% interest loans to propel their growth.



"**It was a ripple effect.** That funding turned into more supplies, an online marketing budget, and upgraded equipment and packaging. That increased production and the quality of my products. **With the increased sales, I was able to hire part-time help and expand into local shops.**"

ELIZABETH CANTU, AROMA D' LIZ CANDLE CO.

2025 BOARD MEMBERS



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BOARD CHAIR
James Avery
San Antonio, Texas



James Dreibelbis
VICE CHAIR
CEO, Woodforest National Bank
Spring, Texas



John Chamberlain
SECRETARY
Managing Director,
Tax Credit Finance, Capital One
New Orleans, Louisiana



Steven Lackowski
TREASURER
Chief Financial Officer, Arra Finance
Dallas, Texas

"In 2025, LiftFund's strategy was clear: **expand access**, **respond with urgency**, and **invest with purpose**. As we expanded into new markets, supported businesses recovering from disaster, and increased access to affordable capital, we stayed focused on sustainable growth and lasting impact. **I extend my sincere thanks to my fellow Board members for their leadership and to the LiftFund staff for their unwavering commitment to the entrepreneurs we serve.**"

RHONDA MCGOWN, BOARD CHAIR

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Vyaire Medical
San Antonio, Texas

Roland Barrera
Roland Barrera, LLC
Corpus Christi, Texas

Christopher Rios
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Austin, Texas

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Richard Perez
San Antonio Medical Foundation
San Antonio, Texas

Trey Sadiq
Gauntlet Networks, Inc.
San Antonio, Texas

Brandi Carberry-Vitier
Texas Partners Bank
San Antonio, Texas

A MESSAGE FROM OUR PRESIDENT & CEO

2025 reminded us that the **strength of a community often begins with the people willing to build something of their own**.

This year, LiftFund expanded access to affordable capital, strengthened the support we provide entrepreneurs, and reached a milestone years in the making: **we are now ready to serve small businesses in all 50 states.**

That reach mattered when disaster struck. From the Los Angeles wildfires to catastrophic flooding in the Texas Hill Country, we worked with local leaders, funders, and community partners to get resources into the hands of business owners when time mattered most.

We have seen what happens next. When one small business survives, the impact rarely stops at its front door. Employees keep their jobs. Families retain income. Suppliers and neighboring businesses benefit. Communities hold on to the places and people that make them work.

That ripple effect is at the heart of LiftFund's mission.

I am grateful to the entrepreneurs who trust us, the partners who make this work possible, and the LiftFund team that shows up for them every day. Our work ahead is clear: reach more entrepreneurs, expand access to responsible capital, and help small businesses and their communities become stronger and more resilient.

AMY HEREFORD
PRESIDENT & CEO, LIFTFUND



Photo (left to right): Jared Wolff, Chairman & CEO, Banc of California; Amy Hereford, President & CEO of LiftFund; Philanthropist and business leader Rick Caruso

DONORS

FUNDERS

$1 million+

City of Corpus Christi ▲

City of San Antonio Economic Development Department

The Community Foundation of the Texas Hill Country through the Kerr County Flood Relief Fund

Methodist Healthcare Ministries ▲

Steadfast LA

U.S. Department of the Treasury Community Development Financial Institutions Fund

Wells Fargo Foundation ▲

$250,000-$999,999

CDFI Friendly Fort Worth

James Avery Artisan Jewelry

San Angelo Area Foundation

U.S. Small Business Administration

WoodNext Foundation

$100,000-$249,999

Capital One ▲

Citi Foundation

City of Arlington ▲

City of Laredo

City of McAllen

Economic Justice Fund, a fund of Tides Foundation

Economic Opportunities Program at the Aspen Institute

FinRegLab

H-E-B ▲

Scale Link

Texas Community Bank

United Way of San Antonio and Bexar County

USAA Federal Savings Bank

$50,000-$99,999

Affiliated Workers Association

City of El Paso

City of Elsa

John Childs

San Antonio Area Foundation

Texas Bankers Foundation

$25,000-$49,999

Charles Schwab Bank

Edinburg Economic Development Corporation

First Citizens Bank

Frost

JPMorgan Chase & Co.

Opportunity Finance Network

Port of Corpus Christi Authority ▲■

U.S. Department of Health and Human Services, Community Economic Development, Administration for Children and Families, Office of Community Services

Woodforest National Bank

$10,000-$24,999

BankUnited

Brandon Seale & Susana Canseco

Deanna & Brewster Waddell Family Fund

Electric Company Charitable Foundation

Freeport-McMoRan Foundation

Hancock Whitney ▲

Hixon Properties

Insperity

Low Income Investment Fund ▲

Petty Hefte Family Foundation

PNC Foundation

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Susanna Morrow

United Way of Tarrant County

U.S. Bank Foundation

$1,000-$9,999

Amegy Bank

American Business Association

American First National Bank

Amy Hereford ▲

Bart Patzer

BCS ProSoft

Bill & Mary Regan

Broadway Bank

Christian & Triana Callens ▲

City of Hondo

Dahlia Garcia

Gail Plummer

Gulf Business Printing

Henry & Esmeralda Hereford

James & Karol Dreibelbis

Jeff & Sara Brouillard ▲

Jefferson Bank

John & Ann Clayton Chamberlain ▲



"LiftFund is an opportunity to get another start on your goals and dreams."

LIFTFUND SURVEY RESPONDENT

Juan Garza ▲

Julie Hutchens

Local Initiatives Support Corporation

Mindy Jimenez

Munich Re America Services, Inc.

National Association for Latino Community Asset Builders

Panorama Global

Prosperity Bank

Ramiro Cavazos ▲

Rhonda McGown

Richard & Judy Perez

Richard & Toni Goldsmith

Roland Barrera

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Sage Foundation

Sandra Solano Cantu

Steven & Katy Lackowski

Texas Bank ■

Third Coast Bank

TK Spencer Opportunity Fund

Tolleson Wealth Management ▲

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William & Marilyn Moll

Yolanda Davila ▲

$1-$999

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Adan Mendoza ▲

Adrian Gonzalez ●

Aissatou Sidimé-Blanton

Al Craig Fleming ▲

Alexander Counts

Alexandria Grant ▲

Alexandria Labatte ▲

Alma Valdez Brown

Amanda Lee ▲

Amie Colunga ▲

Analise Sanchez

Angie Sanchez ▲

For every

$1 LiftFund LENDS,

small business owners create a positive return of

$14 in ECONOMIC IMPACT

for the local community.*

Antonio Brandon

April Chase

Arga Bourgeois Smith

Arkintta Taylor

Armando Garcia Jr.

Ashley Castilla

Ashley Harris

Aurelio Sillas ▲

Barry Propes

Bob Schraitle

Brandi Carberry-Vitier ▲

Caitlin Cowart

Carmen Aguilar Zepeda

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Cesar Garza ▲

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Chris Allen

Chris Morton

Christina Olvera

Christopher Aguirre

Christopher Taylor

Chronicle of Philanthropy

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Erin AufderHeide ▲

Ernesto Cruz

Esmeralda Megee ■

Eva De Los Santos

Felix Garcia

Felix Manuel Morales

Florissa Maher ▲

Francisco Gonzalez

Frederick Day

■ Dream Makers Fund Donor ● Legacy Members ▲ Increased

*SABER Research Institute Economic Impact Study estimate

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George Baah
Gerardo Ortiz
Guadalupe Garcia ▲
Gina Palma ▲
Guillermo Feuchter ▲
Guillermo Segura
Guylene Robertson
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Rafael DeLaRosa ▲
Rafael Martinez
Rafael Rojas & Yanbin Che
Raul Quiroga
Raul Villareal

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Veronica Rios
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Victor Ingram
Wade Caldwell
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Whitney Wettberg
Wyatt McDonald ■
Yolanda Tijerina ▲

INVESTORS

$5 million+

Federal Home Loan Bank of Dallas
PNC Foundation
U.S. Small Business Administration
Woodforest National Bank

$1 million-$4.9 million

Bank of America
Cadence Bank
Credit Human
Hancock Whitney
Michael & Susan Dell Foundation
National Association for Latino Community Asset Builders
Opportunity Finance Network
Starbucks Corporation
Texas Capital Community Development Corporation
The Northern Trust Company
U.S. Bancorp Impact Finance
Wells Fargo
WoodNext Foundation

$250,000-$999,999

Affordable Homes of South Texas, Inc.
Amegy Bank
American Bank
Appalachian Community Capital
Austin Community Foundation
BankUnited
Broadway Bank
Community Foundation for Greater Atlanta
Farm Bureau Bank
First Citizens Bank
HomeTown Bank
Lakeside Bank
MapleMark Bank
Raza Development Fund, Inc.
Simmons Bank
Sisters of the Incarnate Word and Blessed Sacrament
Sustainable Communities Fund
Texas Community Bank
Texas Department of Agriculture
Vince Foster
Texas Partners Bank

$100,000-$249,999

CNote
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Joel & Robin Abrams
Mary Mauze Siff
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Sisters of Charity of Nazareth

$25,000-$99,999

Adorers of the Blood of Christ
Rick Schimpff
Society of the Divine Word
Texas Women's Foundation
Tolleson Wealth Management

$10,000-$24,999

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City of Corpus Christi
David Blair
Elizabeth Blissman
Eloise Avila
Kate Silva
Luz Elena & Edward Day
M. Kathryn Martin
Redman Foundation
Terri & Roger Virost ●

$1,000-$9,999

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Debra Salge
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Harry Shafer
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Todd Coerver
William Elizondo
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■ Dream Makers Fund Donor ● Legacy Members ▲ Increased

Supporting All Entrepreneurs.
Building Successful Businesses.

LiftFund.com

LiftFund

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