

# Impact Investment LOI: *Mortenson Family Foundation*

## *Enterprise Information*

### **Enterprise Name\***

### **Enterprise Type\***

**Choices:** for-profit, non-profit public charity, fund manager, other

### **Enterprise Date of Incorporation\***

### **Enterprise Mission and Profile\***

### **Enterprise Website\***

## *Investment Information*

### **Investment Type\***

**Choices:** real asset, deposit, loan, guarantee, equity-like debt, public debt, public equity, private equity, private debt, Bond

### **Capital Raise Goal (if applicable)**

## *Use of Funds*

### **Summary\***

Please provide a summary of the investment you are seeking.

## *Expected Returns at Time of Investment*

### **Social Return\***

What are the expected social returns? Include alignment with Foundation's Joint Giving Areas: Poverty/Education, Environment, International.

### **Financial Return\***

What will be the financial return to the Foundation? Include rate of return or equity options, etc. Indicate market rate, or below market rate.

### **Repayment Schedule (if appropriate)**