SchoolBuild Service Provider Directory: Financial Consultant

*Thank you for taking the time to fill out this form in order to be listed on the*[SchoolBuild Service Provider Directory](https://www.lisc.org/charter-schools/funding-options/pcp/)*.  Please email the completed survey to*[schoolbuild@lisc.org](mailto:%20schoolbuild@lisc.org) with the subject line: Service Provider Directory Submission.

**Date Submitted:**

**Organization Name:**

**Vendor Type:**

***Please select the designation that applies to your organization***

\_\_ Bond Underwriter

\_\_ Conventional Lender

\_\_ Financial Consultant

\_\_ For Profit Real Estate Developer

\_\_ Nonprofit Lender

\_\_ Nonprofit Real Estate Developer

\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please provide your mission/vision and description of your organization to be included on the website:**

**Number of Charter Schools Supported:**

**Dollar Amount of Financing:**

**Year Founded:**

**Contact Name:**

**Contact Email:**

**Contact Website:**

**Types of Charter Schools Served:**

\_\_ less than 1 year of operating history

\_\_ more than three years of operating history or one charter renewal

\_\_ charter management organizations

\_\_ stand-alone schools

\_\_ single-site schools

**Please select all the states where you operate:**

**\_\_** National \_\_ Alabama \_\_ Alaska \_\_ Arizona

\_\_ Arkansas \_\_ California \_\_ Colorado \_\_ Connecticut

\_\_ Delaware \_\_ Florida \_\_ Georgia \_\_ Hawaii

\_\_ Idaho \_\_ Illinois \_\_ Indiana \_\_ Iowa

\_\_ Kansas \_\_ Louisiana \_\_ Maine \_\_ Maryland

\_\_ Massachusetts \_\_ Michigan \_\_ Minnesota \_\_ Mississippi

\_\_ Missouri \_\_ Nevada \_\_ New Hampshire \_\_ New Jersey

\_\_ New Mexico \_\_ New York \_\_ North Carolina \_\_ Ohio

\_\_ Oklahoma \_\_ Oregon \_\_ Pennsylvania \_\_ Rhode Island

\_\_ South Carolina \_\_ Tennessee \_\_ Texas \_\_ Utah

\_\_ Virginia \_\_ Washington \_\_ Washington D.C. \_\_ Wisconsin

\_\_ Wyoming

**Are you an individual or affiliated with a consulting company?**

**\_\_** Individual \_\_ Company

**If you are affiliated with a consulting company, what is the company name?**

**Specialties:**

\_\_ Federal CDFI Bond Guarantee Program

\_\_ Financing Strategy/Packaging Financing

\_\_ New Markets Tax Credits

\_\_ Q- Bonds (Qualified School Construction Bonds and Qualified Zone Academy Bonds)

\_\_ State Financing Options

\_\_ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Which of the major types of lenders do you offer to your clients? *(Please select all that apply)***

\_\_ Bond Underwriters

\_\_ Major National Banks

\_\_ Nonprofit/CDFI Lenders

\_\_ Regional/Local Banks

\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Do you specialize in connecting your clients to one of these lending categories?**

\_\_ Yes \_\_ No

**If yes, please detail the lending categories that you specialize in:**

**What is your organization’s minimum project size?**

**How does your organizations decide which charter schools to work with?**

**How do charter schools find out about you?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Recent Projects** | | | | |
|  | Charter School Name | Total Project Cost | Lending Institutions | Public Subsidies, NMTC, Q-Bonds, State Programs |
| Example 1 |  |  |  |  |
| Example 2 |  |  |  |  |
| Example 3 |  |  |  |  |
| Example 4 |  |  |  |  |
| Example 5 |  |  |  |  |