

People Inc. Financial Services

AGENDA

May 9, 2019

6:00 p.m.

At Lebanon and via teleconference

1-800-504-8071 pass code 6289188

*6 to mute

*7 to un-mute

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|-----|--|-------------------|
| 1. | Call to Order | Charlotte Mullins |
| 2. | Roll Call/Determination of Quorum | Amanda Ball |
| 3. | Approval of Agenda | Charlotte Mullins |
| 4. | Client Presentation | Shane Simmons |
| 5. | Approval of Minutes
*February 14, 2019 | Charlotte Mullins |
| 6. | Financial Report
a. Balance Sheet
b. Capitalization Report
c. Financial Statements | Janet Shrader |
| 7. | Approval of 990 | Janet Shrader |
| 8. | Audit of Grundy Town Center &
LowCountry Biomass Transactions | Bryan Phipps |
| 9. | Program Report
a. Quarterly Portfolio Quality Reports-CDFI & NDDF
b. Business Pipeline Summary
c. Consumer Pipeline Summary | Shane Simmons |
| 10. | New Markets Tax Credits (NMTC) Program Update
a. Current Project Update
b. Pipeline Report
c. Advisory Committee Report | Bryan Phipps |

People Incorporated of Virginia

Headquarters 1173 West Main Street, Abingdon, VA 24210 Phone: 276.623.9000 or 276.466.6527 Fax: 276.628.2931 Email: info@peopleinc.net

Bristol Office 800 Martin Luther King, Jr. Boulevard, Bristol, VA 24201 Phone: 276.466.5587 Fax: 276.466.0728 Email: bristol@peopleinc.net

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Woodstock Office 135 South Main Street, Woodstock, VA 22664 Phone: 540.459.9096 Fax: 540.459.8732 Email: woodstock@peopleinc.net



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| 11. | 2018 New Market Tax Credits Application | Rob Goldsmith |
| 12. | 2019 CDFI Fund Application | Rob Goldsmith |
| 13. | Appalachian Community Capital Loan Request | Rob Goldsmith |
| 14. | PIFS Strategic Plan Amendments | Rob Goldsmith |
| 15. | Other Business | Charlotte Mullins |
| 16. | Next Board of Directors' Meeting
*August 8, 2019 – 3:00 p.m. – via teleconference | Charlotte Mullins |
| 17. | Adjournment | Charlotte Mullins |

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