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**CDICD**

CENTER FOR DISABILITY-INCLUSIVE  
COMMUNITY DEVELOPMENT

# Creating Your Story for Financial Institution Partnerships

## Organization Overview

Organization Name

Organization Mission

**Organization Budget**

**Organization Staff Capacity (number of staff and key leadership)**

**Describe primary clients served (e.g., people with disabilities, communities of color, family members, general)**

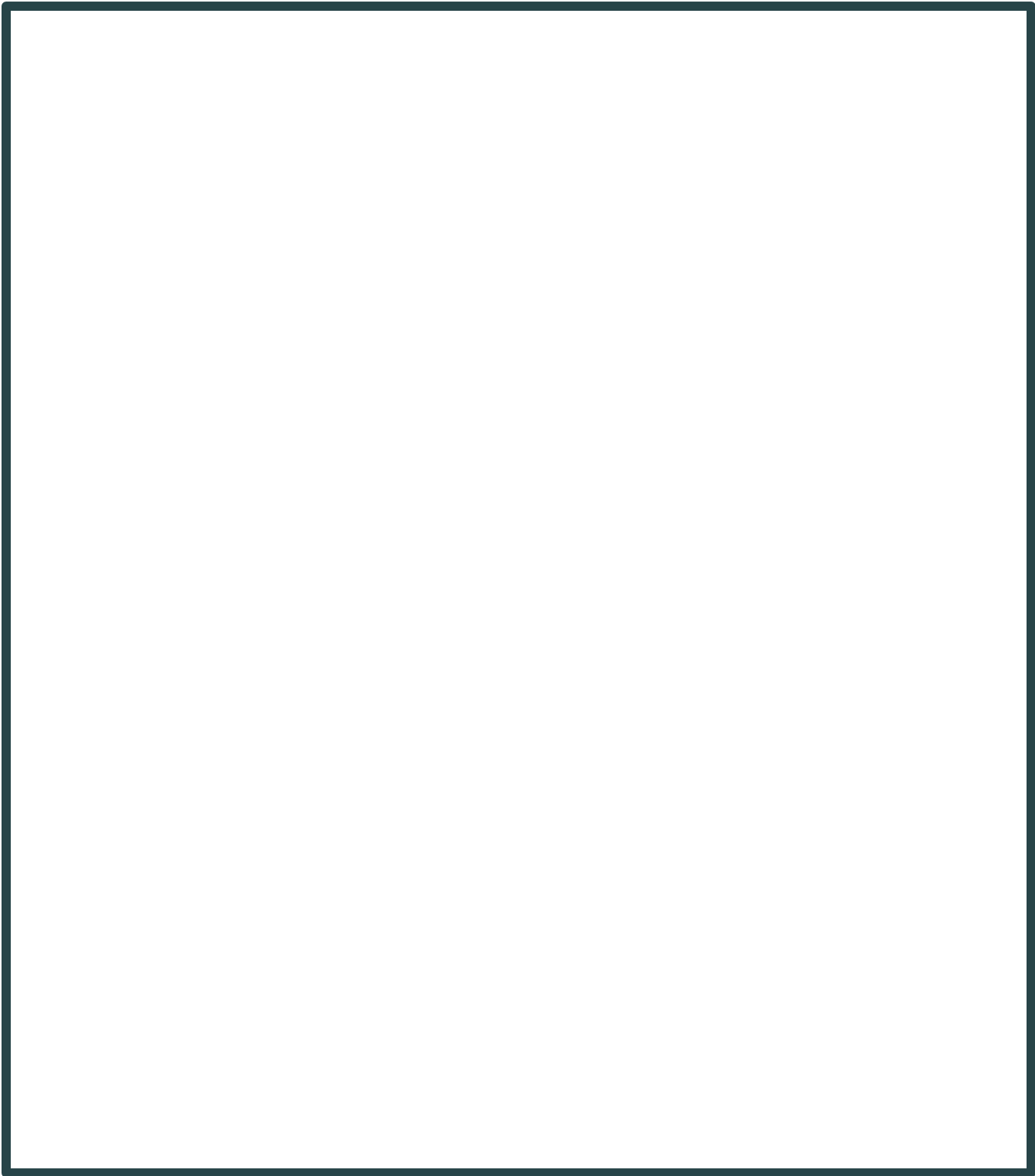
**Number of clients served by organization**

**Neighborhood/Community served by organization**

**Describe key services provided by your organization**

**Organization’s Achievements (four bullet points on measurable and impactful of goals achieved)**

**Examples of Partnership and Collaborations**




# Gaps in Serving the Needs of the Community

Description of program idea, goals and objectives to fill the gap

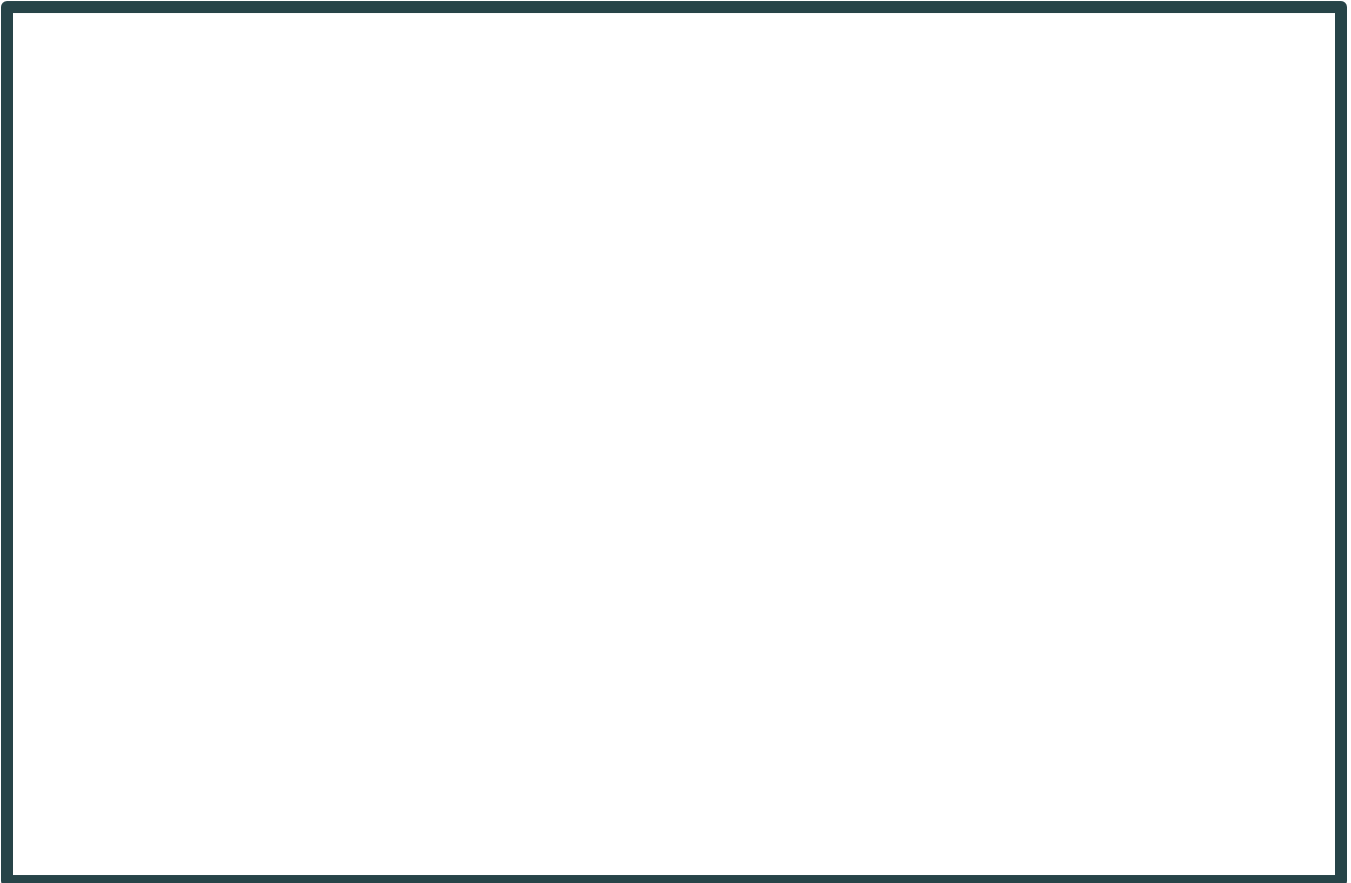
**Partnership ideas to fill in the gaps**

**Clientele the partnership will serve**

**Strategy to verify demographics of the clientele are LMI (ex. number of individuals receiving Medicaid, SSI, or SNAP)**

A large, empty rectangular box with a dark teal border, intended for the user to write a strategy to verify demographics.

**Anticipated success and outcomes (four bullet points on measurable and impactful results)**

A large, empty rectangular box with a dark teal border, intended for the user to write anticipated success and outcomes.



# Goals and Objectives

Short

Intermediate

Long-Term

1. *Introduction*

2. *Background*

3. *Methodology*

4. *Results*

5. *Discussion*

6. *Conclusion*

7. *Acknowledgments*

8. *References*

9. *Appendix*

10. *Index*

11. *Glossary*

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How could financial institutions be most helpful to the program/initiative (e.g. mentoring, grants, serving on the board/advisory committee, providing financial education, etc.)?

**Identify services provided by financial institutions in targeted communities**