

CCM's DEI Strategic Plan

CCM is committed to the principles of diversity, equity, and inclusion (DEI). We believe incorporating DEI policies and practices enhances results, and as such, we facilitate diversity in employee hiring, training, and promotion and also consider them in our investment processes. This perspective shares an update on the firm's DEI efforts over the last year.

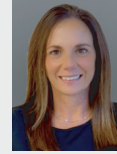
Strategic Plan

To cultivate an inclusive work environment in which all employees meaningfully engage and can develop and succeed, CCM developed a DEI Strategic Plan for fiscal years 2021–2024. The plan includes measurable actions that are designed to help fully integrate diversity, inclusion, and opportunity in the strategic decision making of the firm; enhance organizational effectiveness; and meet future challenges. The Committee has begun the work to update the strategic plan for the next five years (2025-2030) and anticipates releasing it in January 2025.

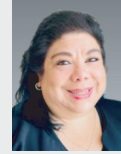
Members of CCM's DEI Committee



James Malone,
Chief
Financial
& Diversity
Officer



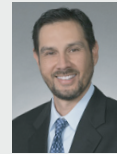
Ilyne Barten,
Chief of
Staff



Frances Llano,
Senior
Operations &
Compliance
Manager



Shonali Pal,
Portfolio
Manager



Cayce Shawn,
Trader



Amina Rubin,
Impact
Research
Analyst

CCM's **DEI committee** is a small group of employees who champion DEI in the workplace. The group comprises members across the organization who help establish a supportive and welcoming workplace environment in which employees of all backgrounds and demographic characteristics can work together.

GOAL 1 Build consensus around the mission and vision of the Strategic Plan for diversity and inclusion within the company

To continue our efforts to promote diversity and inclusion in the company, CCM celebrated and honored observances throughout the year. These included Black History Month, Women's History Month, and Pride Month, among others, where activities and meetings included Ted Talks, history challenges, and interactive team building events.

GOAL 2 Maintain a gender-neutral workforce and work toward racial neutrality (30% racial minority)

We are pleased to report that we continue to meet goal 2 with our gender and racial diversity as of 06/30/24.



GOAL 3 Engage with the broader community to promote equity, social justice, and inclusion (i.e., local community volunteer activities, corporate social responsibility initiatives)

CCM continues to partner with community organizations to promote equity, social justice, and inclusion. Activities include sponsoring and volunteering with organizations including the Urban League of Broward County, Rosie's Place, local youth sports leagues, and other community-oriented non-profits.

GOAL 4 Enhance accountability, effectiveness, and collaboration through strategic use of DEI-related data in planning and assessment

We continue to look for new ways to enhance accountability and collaboration through the use of DEI-related data. Over the last year, the committee established a framework for qualitative and quantitative data and looks to continue finding diverse vendors, including those that are minority-owned, disabled-owned, and woman-owned.

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