



Place Based Investing

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Place Based Investments Associate

Our Mission

Helping People Live the Healthiest Lives Possible®

Mission for our Catholic entities:

“We reveal and foster God’s healing love by improving the health of the people and communities we serve, especially those who are poor and vulnerable.”

Intermountain by the Numbers¹



6 Primary States²
(UT, NV, ID, CO, MT, WY)



66,000+
Caregivers



Select Health **1.1 million**
Members



33 Hospitals
Including 1
Virtual Hospital



\$16.06 billion
Total Revenue



400
Clinics

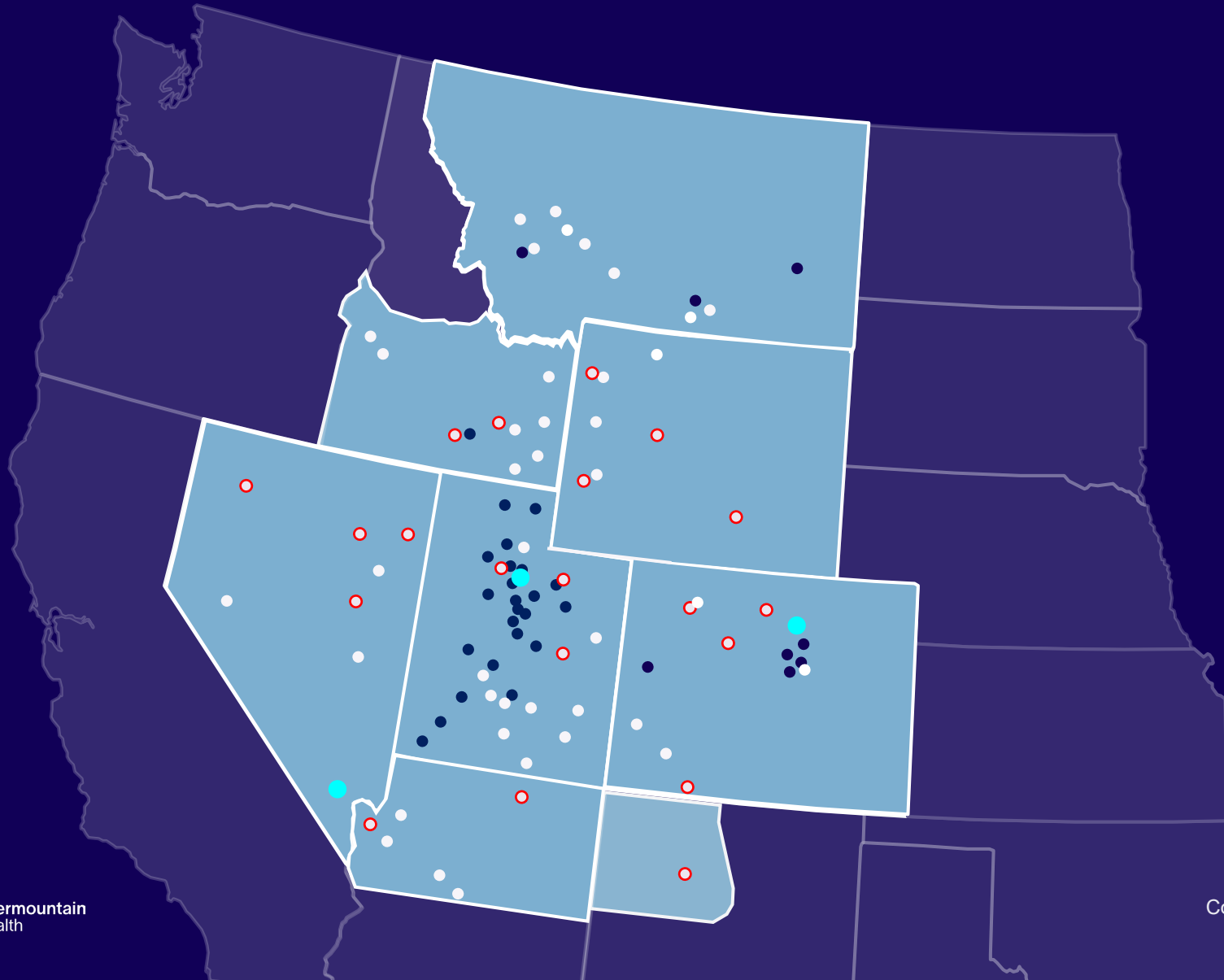


4,800
Licensed Beds



4,600+ employed
Physicians & APPs

Intermountain Health's Current Footprint



- Hospitals
- Region HQ
- Affiliate/Outreach Partnerships
- Classic Air Medical Bases

What is a Place Based Investment?

WHAT?

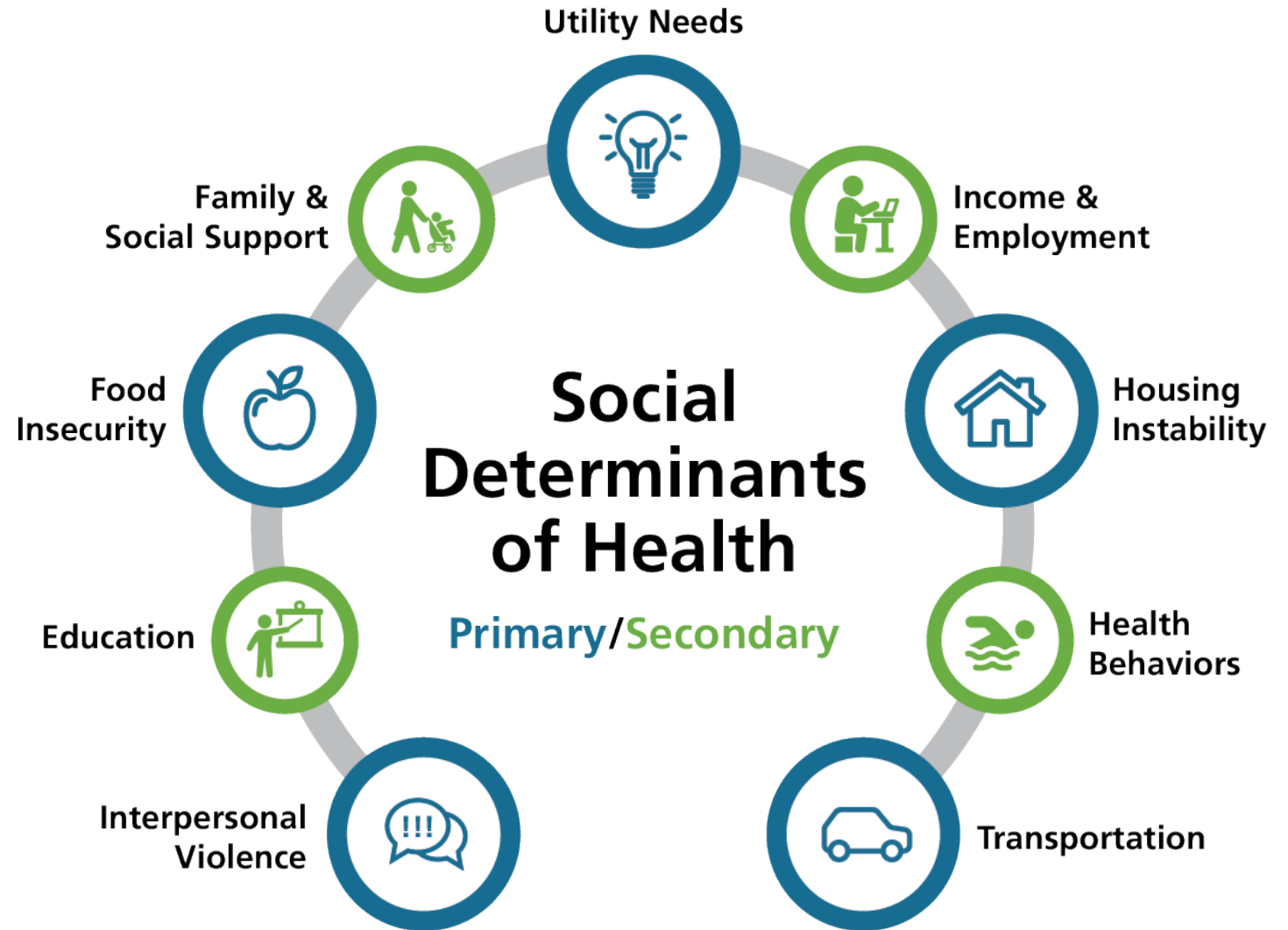
Address a social determinant of health and earn modest financial return

WHO?

Low-and-moderate income community members

WHERE?

Intermountain Health Regions



What is a Place Based Investment?

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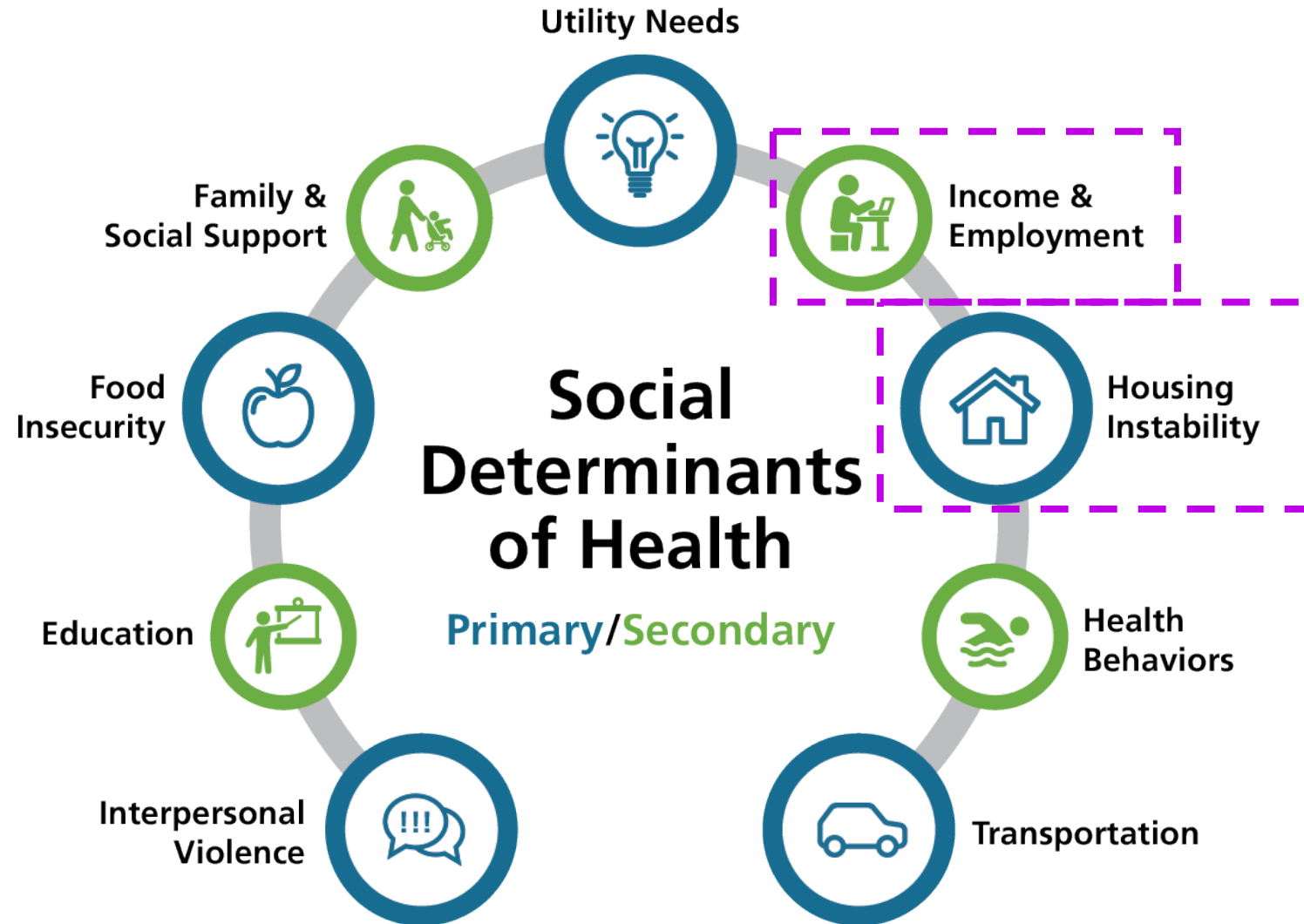
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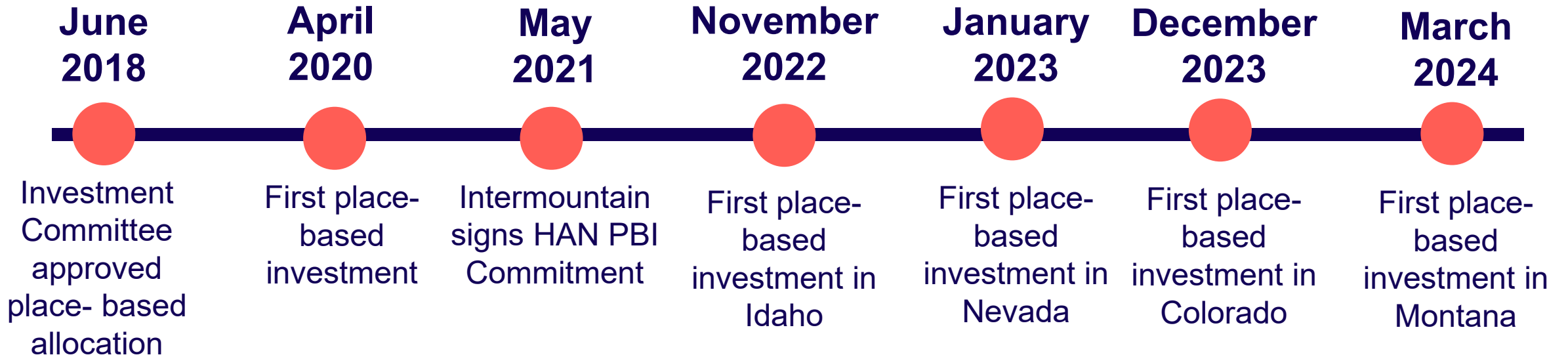
Low-and-moderate income community members

WHERE?

Intermountain Health Regions



Facts and History



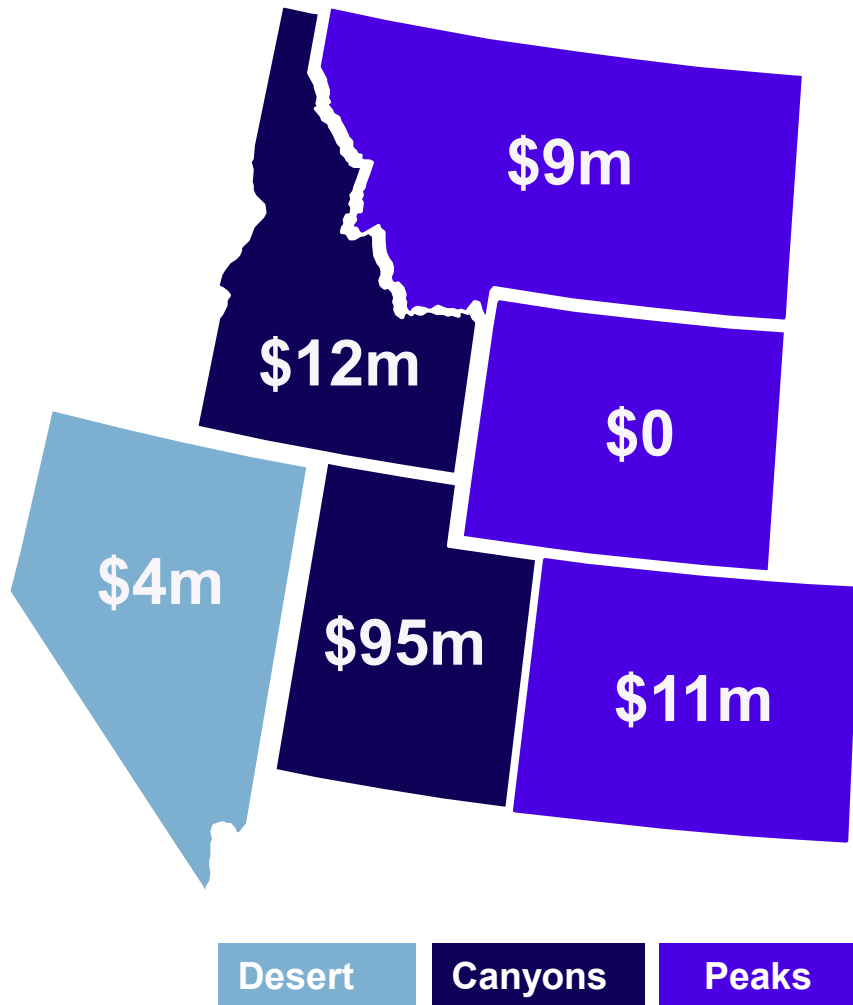
Allocation

\$190,000,000

Target Population

<120% AMI

Investments Committed Since 2019



\$94m



Housing
Stability

2,479
affordable
units

\$38m



Financial
Wellness

961
beneficiaries

Expansion Priorities

- Intermediary investments (CDFIs, etc.)
- High additionality anchor collaborations

515 Tower Adaptive Reuse

A Resident Wealth-Generating Project



PERPETUAL
HOUSING
FUND



SLCRDA



Intermountain
Health



ZIONS
BANK



UTAH
HOUSING
corporation



ROCKY MOUNTAIN
HOMES FUND

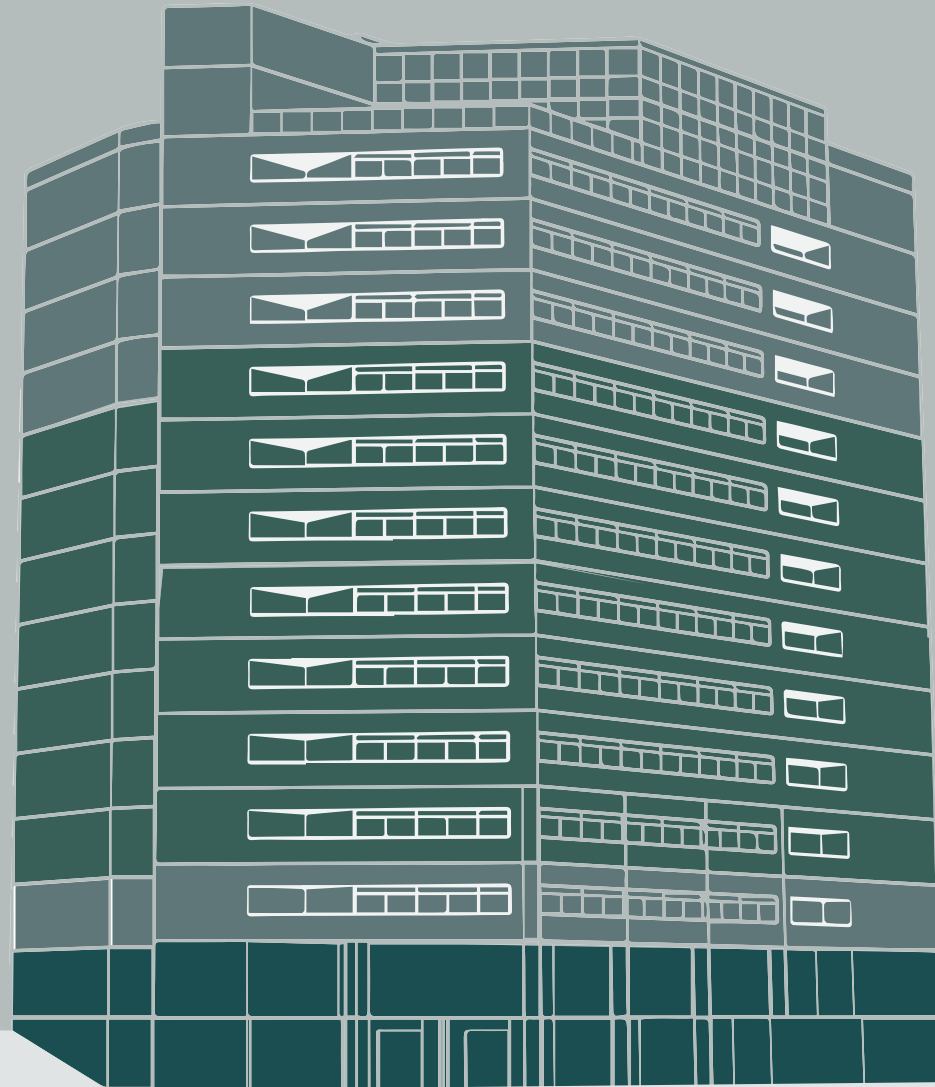


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515 Tower - Phase I

Phase 1 Unit Mix

	AMI	Units
Studio	25%-55%	40
1 Bedroom	25%-55%	8
3 Bedroom	25%-55%	32
4 Bedroom	25%-55%	16
Total		96



PHF Phase I
96 Units
(<55% AMI)



Community
Uses

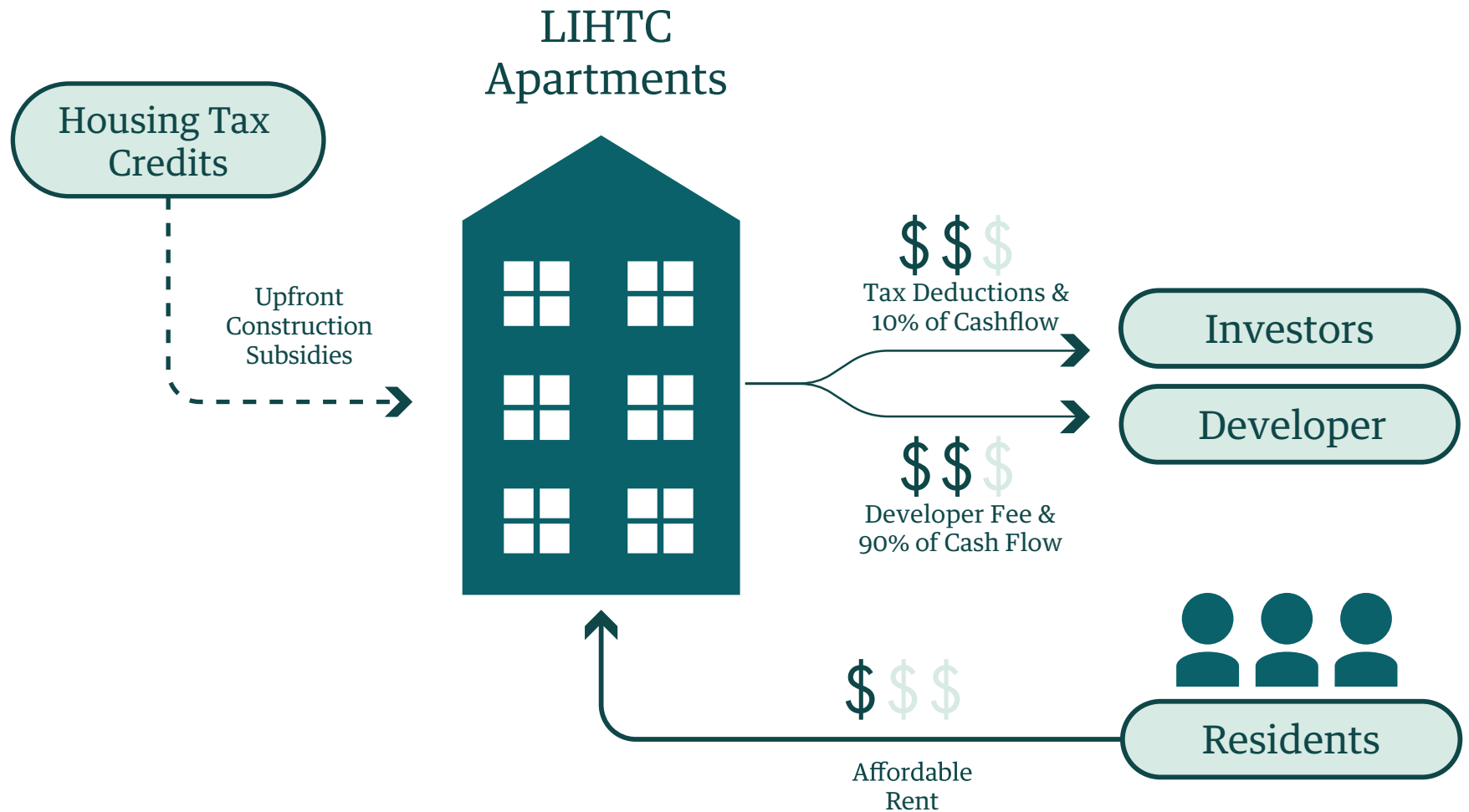


515 Tower - Phase 1



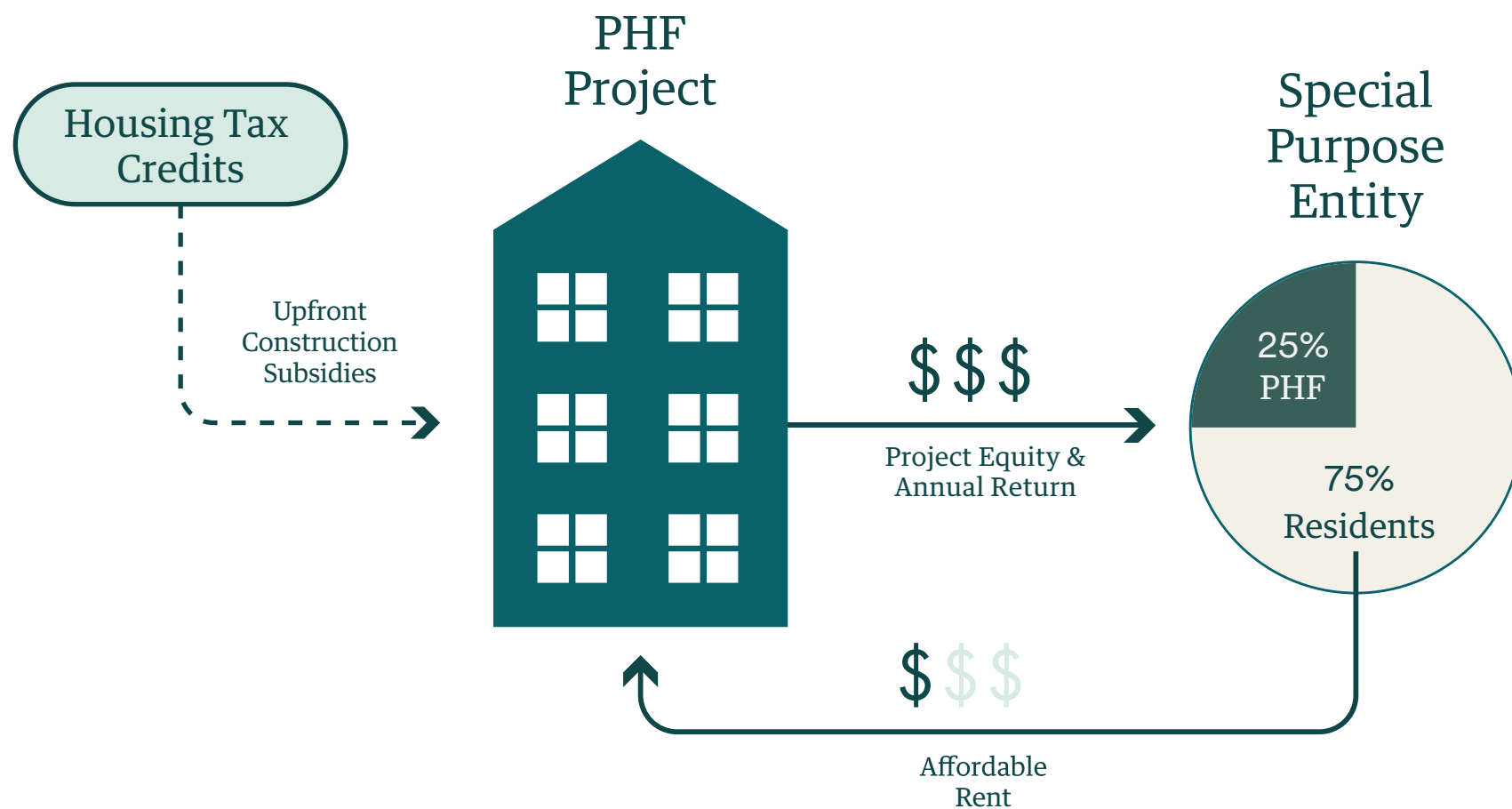
The Perpetual Housing Fund

In a typical LIHTC project, residents get affordable rent, and developers get paid:



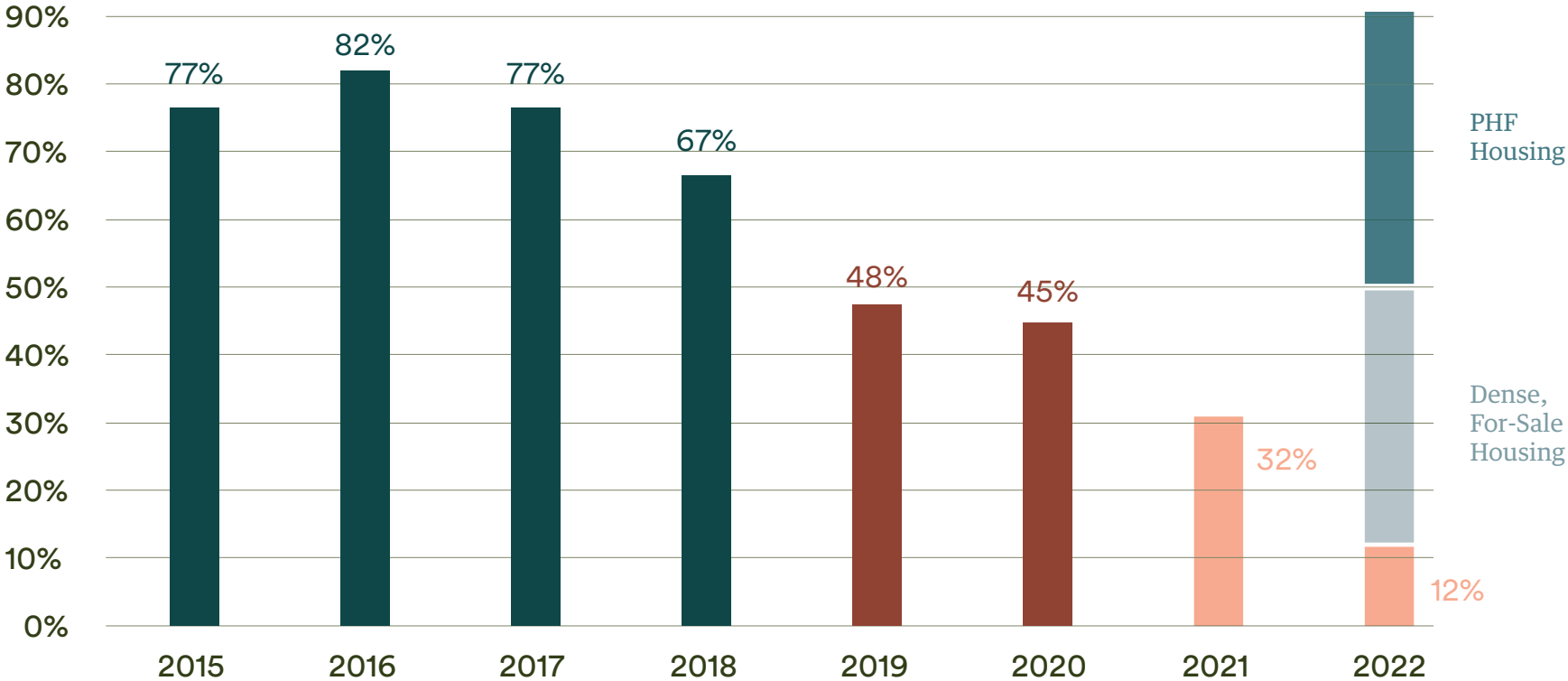
The Perpetual Housing Fund

PHF pairs existing LIHTC subsidies with shared ownership to benefit building residents.



Together We Can Change The Narrative

Percentage of Utah Home Sales
Affordable to Households Earning Area Median Income





PERPETUAL
HOUSING
FUND



SLCRDA



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BANK



ROCKY MOUNTAIN
HOMES FUND



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