



Investor Levels & Benefits

Upstate Colorado Economic Development is funded through investments by Private Sector Companies, Public Sector Municipalities, Business Organizations, Quasi-Governmental Organizations, Educational Institutions, and Nonprofit Agencies. Our investors are the backbone of our organization. They provide the resources needed to carry out our region's economic development priorities—to create high-wage, high-value jobs through diversification of the local industry base.

Long-term investment in Upstate Colorado returns big dividends, both for the community and local businesses. Upstate works closely with both public and private sector stakeholders because we believe our success is directly linked to increased opportunity for everyone. Investors pool resources together in order to sustain the work of the organization, and cultivate a more competitive and diverse business climate.

Direct benefits for each investment level are defined below:

CHAIRMAN'S ADVISOR (\$25,000+ annually)

- **Board Seat:** Two seats on the Board of Directors are reserved for private sector Chairman's Advisor investors.
- **Website:** Logo on the website in prominent locations (i.e. Homepage, Top of Partners Page), along with personal description, link, contact information, and in a searchable database of investors.
- **Special Events:** Presenting sponsor on all major events with special mention in electronic and written communications/publications.
- **Print Material:** Logo featured on relocating company inquiry response packet.
- **Organizations investing at the Chairman's Advisor level will also receive Leadership Council Perks: Emerging Opportunities Fund, Annual Report & Premier Investor, Investor, & Supporter Perks.**

LEADERSHIP COUNCIL (\$10,000 - \$24,999 annually)

- **Emerging Opportunities Fund:** The Leadership Council will meet as needed to discuss regional issues and future initiatives. The council serves as an important advisory network designed to:
 - Influence public opinion on issues including the region's capacity to develop infrastructure, education, and other public policy opportunities.

- Remove difficult barriers for growth and propel positive change.
- **Board Nomination:** Members are eligible for nomination to the Upstate Colorado Board of Directors. Seven Board seats are reserved for private sector Leadership Council Investors.
- **Website:** Special recognition on the website, including a secondary listing with company logo, lengthy description, link, contact information, and searchable database of investors.
- **Special Events:** Recognized as being sponsors of every Upstate event and mentioned accordingly at Leadership Council Sponsored Events (Pitch Deck) and the Annual Meeting.
- **Organizations investing at the Leadership Council level will also receive Premier Investors Perks: Customized Research, Investor, & Supporter Perks**

PREMIER INVESTORS (\$5,000 - \$9,999 annually)

- **Customized Research:** Access to Upstate's economic forecasts and research. Staff can provide customized data in all areas for Weld County (i.e. real estate/site selection, industry profiles, company listings, taxes, regulation, housing, transportation/commuting patterns, and utilities.)
- **Website:** Recognition on the website, including an enhanced listing with company logo, small description, link to company, contact information, and searchable database of investors.
- **Organizations investing at the Premier Investors level will also receive Investors Perks: Leadership Opportunities, Referrals, & Special Events.**

INVESTOR (\$2,500 - \$4,999 annually)

- **Leadership Opportunities:** Opportunity to serve on Solutions Teams, committees, and task forces. Upstate Colorado is the region's largest private/public partnership that enhances wealth creation by marketing Weld County and helping employers retain and create quality jobs.
- **Referrals:** Included on our development consultant/service directory provided to prospective companies. Upstate assists growing and relocating companies and is often able to refer company inquiries to our investors and provide direct introductions between investors for business development opportunities.
- **Website:** Recognition on the website, including an enhanced listing with company logo and link company's page, and searchable database of investors.
- **Special Events:** Invitation to the Annual Meeting and other events that feature presentations by industry experts, as well as Upstate's client announcements (groundbreakings, ribbon cuttings, etc.)
- **Organizations investing at the Investor level will also receive Supporter Perks: Enterprise Zone, Confidential Service, Annual Report, & Public Events**

SUPPORTER (\$500 - \$2,499 annually)

- **Enterprise Zone State Tax Credit:** Upstate is a Certified Enterprise Zone Project, which entitles investors to receive a Colorado State Tax Credit for their participation in building a better economic future for Northern Colorado. The EZ system allows you to take advantage of a Colorado State Tax Credit of 25% of your cash investment or 12.5% of any

in-kind investment. We prepare and submit the necessary forms and return them to our local EZ Administrator for certification. For Federal income tax purposes, Upstate investments are tax deductible as an ordinary business expense. EZ certificates are provided to anyone making a \$100 investment or greater.

- **Confidential Services:** Upstate is a one-stop resource center for companies interested in remaining/expanding in or relocating to the Weld County Area. Upstate refers clients to the proper sources and coordinates the work of multiple agencies on behalf of clients. These services are available: site selection, coordination of funding (from local, state, and federal sources), workforce development, international assistance, and public relations.
- **Annual Report:** Recognition in the Annual Report. It's published each spring. Electronic versions will be distributed throughout the year and will be made available on the website.
- **Website:** Company's name listed on the website and included the searchable database of investors; this provides regional and national exposure.
- **Public Events:** Invitation to attend events that feature presentations by industry experts, and the Annual Meeting.

Companies interested in supporting economic development and learning more about how our efforts impact their bottom line can contact Richard Werner, President & CEO, at 970.356.4565 or rwerner@upstatecolorado.org.