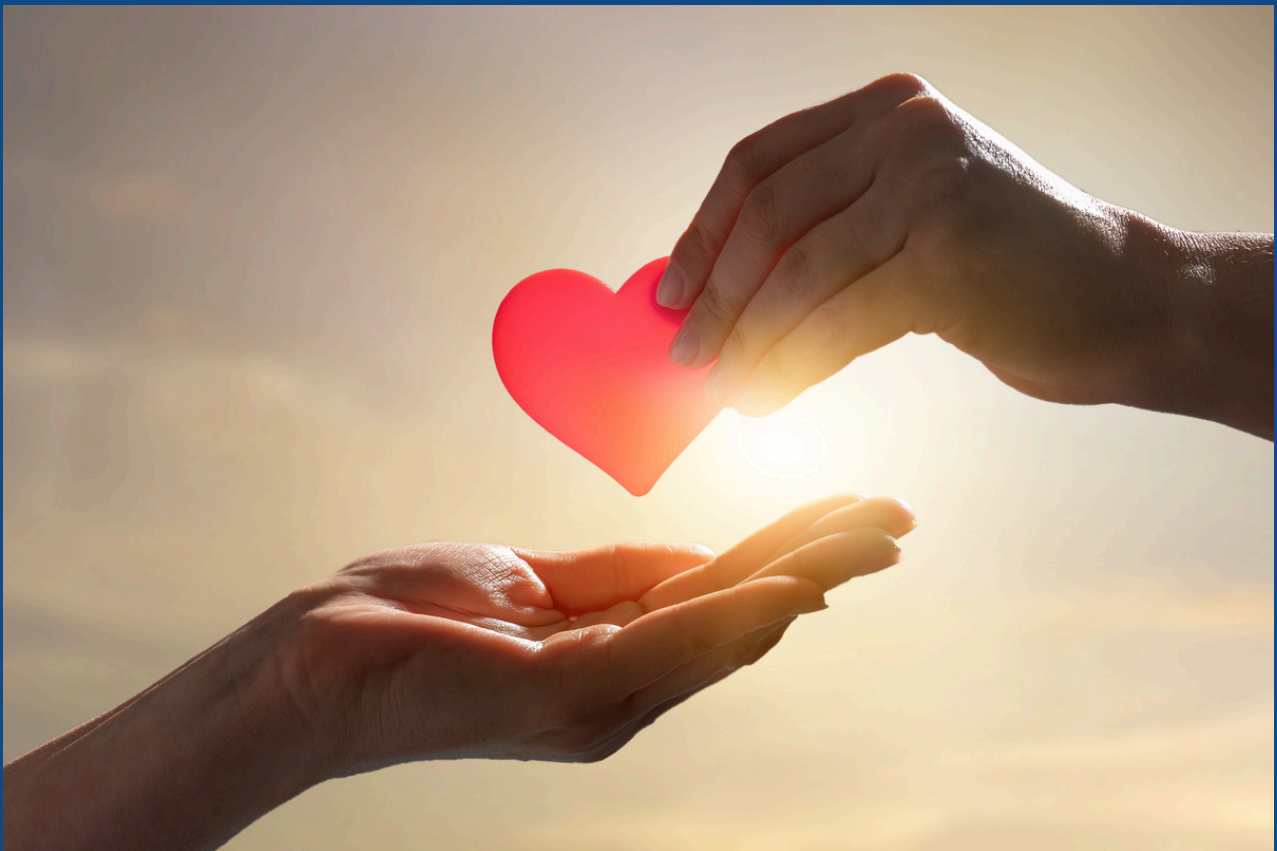


beyond
EQUITY GROUP

IMPACT REPORT



2024



Investing in Communities. Building Futures.

PURPOSE AND COMMITMENT

At Beyond Equity Group, we believe in creating more than affordable housing. We believe in building futures. By addressing the financial and systemic barriers families face, we aim to provide safe, affordable homes and tools for long-term stability. In 2024, we began piloting impactful initiatives to ensure the communities we serve can focus on thriving, not just surviving.



2024 PILOT INITIATIVES AND METRICS



Affordable Housing Pathways Audit Tool:

Launched as a pilot in 2024, with the first family supported and a plan to scale to at least one family per month in 2025.

Community Engagement Initiatives:

Supported 247 units through programs like the Rise Blue Ridge Backpack Giveaway.

Heal the Home Pilot (2025):

Planned repairs and education for 10-12 families with an estimated healthcare savings of \$250,000 annually.

1. AFFORDABLE HOUSING PATHWAYS AUDIT TOOL: PILOTING SOLUTIONS

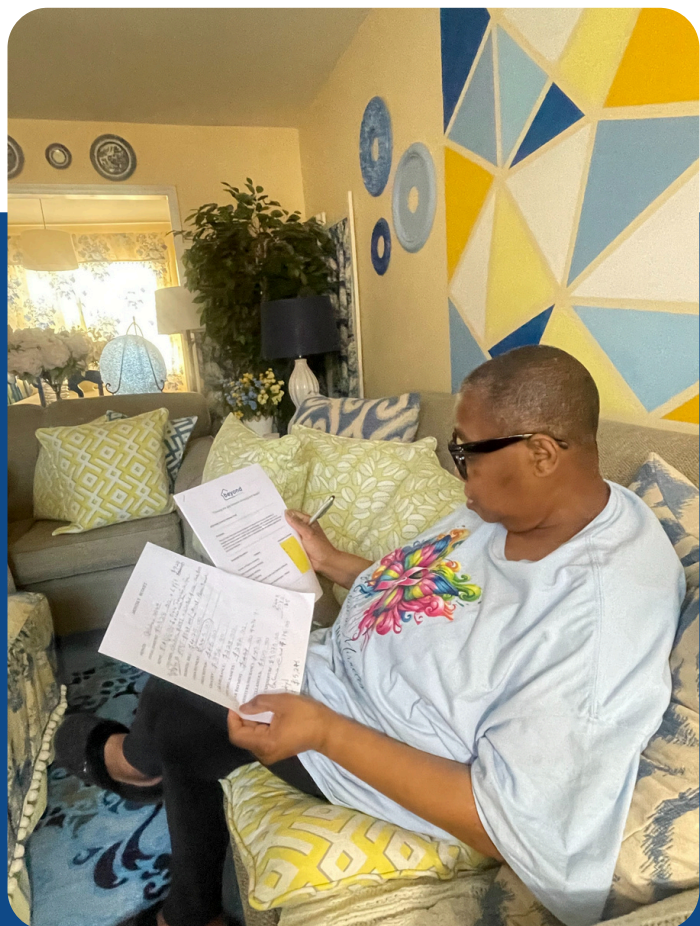
PURPOSE:

Reducing monthly utilities and maintaining affordable rent provides long-term cost benefits that reduce financial strain, open the door for better overall wellness, and alleviate many emotional stressors tied to housing and healthcare. The Autman family represents many families in similar circumstances looking for a way out.

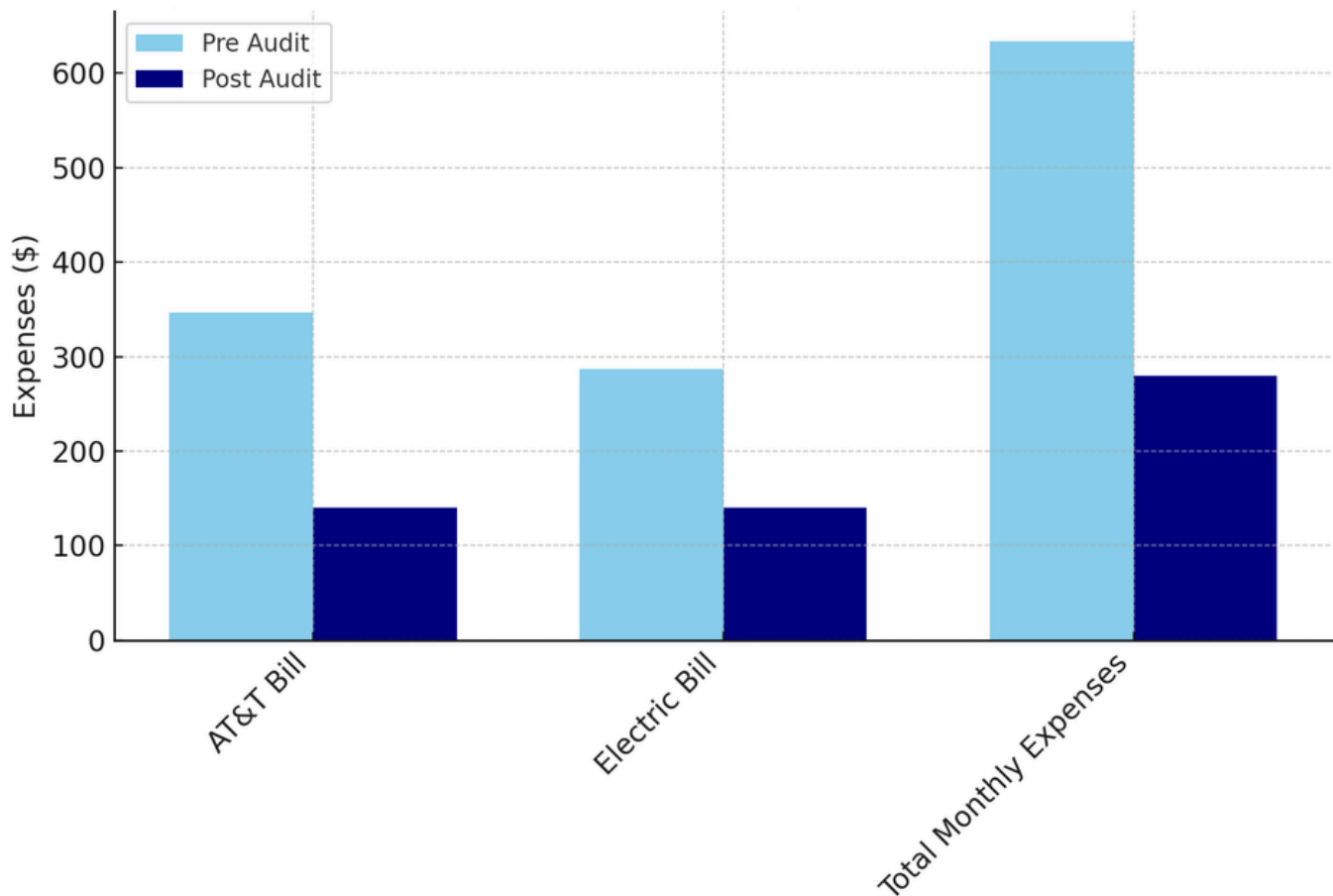
CASE STUDY: THE AUTMAN FAMILY

In its first use, the audit tool helped the Autman family, whose total housing costs exceeded the 30% affordability threshold due to high utility bills and service costs. Through the audit:

- **AT&T Bill Adjustment:** We are advising on plans to reduce their service cost from \$347 to closer to the Charlotte average of \$140, potentially saving \$207 per month.
- **Energy Efficiency Recommendations:** Recommendations include upgrading appliances to more energy-efficient models and identifying a window replacement to reduce utility costs.
- **Partnership with the Landlord:** Ensuring stable rent to maintain affordability.



COMPARISON OF PRE- AND POST-AUDIT EXPENSES FOR THE AUTMAN FAMILY



PROJECTED IMPACT:

These changes could save the Autman family approximately \$403 monthly, bringing their housing costs below 30% and providing financial relief. This provides financial and emotional relief that contributes to the family's overall well-being, potentially impacting their bank accounts and healthcare costs. Emotional strain from financial stress has known links to chronic conditions and healthcare challenges, making this intervention critical.

Your support makes stories like the Autmans' possible. Visit beyondequitygroup.com/impact to see how you can contribute by donating, volunteering, or learning more about our mission.

2. PROVIDING AFFORDABLE HOUSING: STORIES OF HOPE AND STABILITY

WASHINGTON HEIGHTS: A YEAR OF IMPACT

Beyond Equity Group worked directly with residents at properties like Washington Heights, making affordable housing accessible. A tenant shared her gratitude after receiving a reduced rental rate: **“I can finally give my children the gift of a safe home for Christmas.”**

While this mother was overjoyed to provide a safe home for her children at Christmas, the reality is that her one-year lease ensures a stable home throughout the year. With her affordable rent locked in, she can continue working the daycare job she loves, pay other bills, and focus on her children rather than financial strain. In a world where stress is a leading contributor to poor health, we are proud to create opportunities that not only provide shelter but also empower single mothers to prioritize their children's well-being, afford healthcare, and even experience life beyond their homes. This stability reduces stress, enhances health, and brings joy to families like hers.

This story illustrates how affordable housing provides more than shelter—it creates opportunities for families to thrive.

Affordable housing changes lives. Visit beyondequitygroup.com/impact to help us expand opportunities for families like those at Washington Heights. Scroll to the bottom of the page to find ways to get involved.

3. COMMUNITY ENGAGEMENT: RISE BLUE RIDGE BACK-TO-SCHOOL INITIATIVE

PURPOSE:

Beyond Equity Group supports families in practical ways beyond housing. The Rise Blue Ridge Backpack Giveaway helped families prepare for the school year without financial stress.

EVENT HIGHLIGHTS:



- Distributed backpacks filled with school supplies to 247-unit residents.



- Collaborated with property management for community activities like coloring stations and photo booths.



- Promoted educational success by reducing financial burdens for parents.



Programs like the Rise Blue Ridge Backpack Giveaway ease financial burdens for families. To learn more about supporting programs like this or volunteering with us, visit beyondequitygroup.com/impact. Scroll to the bottom of the page to choose how you'd like to get involved—whether donating, volunteering, or simply sharing our mission.

4. THE IMPACT OF HEAL THE HOME: ADDRESSING HOUSING GAPS

OVERVIEW:

Heal the Home (HTH) is set to launch in 2025 to bridge the gap between housing quality and health outcomes. This initiative will provide critical and non-critical repairs, creating healthier and safer homes.

2025 PROJECTIONS:

- **Families Supported:** 10-12 families in the pilot phase.
- **Healthcare Cost Reductions:** Estimated savings of \$250,000 annually through reduced emergency visits and hospital admissions.
- **Repairs and Education:** Targeting poor ventilation, structural issues, and utility inefficiencies.

KEY BENEFITS:

- Healthier, safer homes.
- Reduced financial strain through targeted repairs.
- Education to empower residents for long-term success.

Looking Ahead: 2025 and Beyond

In 2024, Beyond Equity Group laid the foundation for impactful programs that go beyond housing. As we expand in 2025, our focus is on scaling initiatives like the Affordable Housing Pathways Audit Tool and Heal the Home to touch more lives.

For us, success isn't just about financial gains, but the futures we help build. We want single mothers to focus on their children, families to strengthen their bonds, entrepreneurs to uplift their communities, and seniors to enjoy their golden years. By alleviating the burden of unaffordable housing, we empower people to walk in their purpose without distraction.

Signed,

The Beyond Equity Group Team

Mark Smiley, Eric Petty, Caleb Sherrill



WE THANK YOU FOR YOUR ONGOING SUPPORT OF OUR PROGRAM

About Beyond Equity Group

Beyond Equity Group is a real estate investment firm focused on creating impact through affordable housing, health equity, and sustainable community development. Learn more at beyondequitygroup.com.