

Bond Case Briefs

Municipal Finance Law Since 1971

Join Neighborly At This Year's Fintech Awards And Learn How Public Works Can Work For Investors.

The [Benzinga Global Fintech Awards](#) are a yearly showcase of the greatest adverts in fintech from leaders and visionaries in the worlds of finance and technology. This year, we have executives, developers and innovators from the likes of Facebook, Amazon, IBM, JP Morgan, Zelle, TD Ameritrade, TradeStation, Fidelity, and so many more.

In preparation for its biggest installment yet this May, we're profiling the companies competing for the BZ Awards. In this feature we focus in on [Neighborly](#).

What does your company do? What unique problem does it solve?

Garrett Brinker, product manager: Neighborly is a mission-driven fintech firm that operates at the intersection of government, technology and municipal finance. We believe that the humble municipal bond is the original impact investment, and we're committed to reducing the cost and complexity associated with this largely fragmented and often misunderstood market – which has long been dominated by large institutional investors.

Through innovative technology, competitive fee structure and lower denominations, we have created a way to directly connect fiscally responsible issuers with investors who want to generate returns while effecting positive change in the communities where they live, work and play.

Who are your customers?

Brinker: Through our two distinct subsidiaries, we're working to bring issuers and investors closer together to facilitate easier access to impactful public projects, from schools and public parks to next-generation infrastructure such as microgrids:

- **Neighborly Securities:** Our muni broker-dealer, which uses technology to democratize access to impactful public infrastructure projects: from public parks and playgrounds, to municipal broadband or green energy projects. Though Neighborly Securities also serves the advisory community, it has gained enormous traction serving individual investors – in our inaugural (and award-winning) [Cambridge minibond offering](#), 37 percent of participants were first-time bond buyers. The opportunity to invest in meaningful projects in their own backyard resonated strongly with city residents, and continues to do so in municipalities across the country.
- **Neighborly Investments:** Our next-generation technology investment manager focuses on leveraging municipal bonds to maximize after-tax returns through customized impact portfolios. Neighborly Investments predominantly serves: high-net-worth investors who wish to leverage their muni bond allocations to maximal impact; larger RIAs; and institutional investors such as community banks and university endowments that wish to meet CRA Credit requirements, and foster engagement with their local communities.

How long have you been in business?

Brinker: Neighborly was founded in 2012.

Where are you located?

Brinker: Neighborly is headquartered in San Francisco, with strategically located offices in New York City and Boston. We consider ourselves to be an integral part of their respective tech, finance and investment communities.

Who is your company's leadership? What kind of experience do they have?

Brinker: Jase Wilson is CEO and founder of Neighborly, combining expertise in technology, urban planning and entrepreneurship. Prior to Neighborly, Jase founded and operated Luminopolis, a civic software firm focused on saving local governments millions of dollars annually by replacing legacy enterprise software with modern open source equivalents. A keen technologist and urbanist, he studied city planning at MIT and the University of Missouri-Kansas City.

Kiran Jain is the chief operating officer and general counsel at Neighborly. She is the former Chief Resilience Officer for the City of Oakland, one of the inaugural cities in the Rockefeller Foundation's 100 Resilient Cities network. Kiran has served as a senior deputy city attorney focusing on land use, urban redevelopment and municipal governance; she also founded the Civic Design Lab to focus on building community resilience.

Neighborly's broader team harbors decades of combined expertise across the fields of public finance, civic issues and technology.

Who are your investors, if any?

Brinker: 8 VC, Emerson Collective, Bee Partners, Stanford University, Sound Ventures, Fintech Collective

Is there anything else Benzinga should know about your company?

Brinker: We are a diverse team with backgrounds in technology, capital markets and government — all on a mission to help build stronger and more resilient cities through the municipal bond.

To meet with the minds behind companies like Neighborly and others testing the cutting edge of fintech, grab a ticket to the Benzinga Global Fintech Awards May 15-16 in New York.

Chris Dier-Scalise, Benzinga Staff Writer

April 24, 2018 2:08pm