



# GETTING STARTED GUIDE

Thank you for your interest in Investing alongside myself and my Business Partners in high quality Real Estate Deals that we source. Here are the things you can do to prepare to Invest with us.

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## STEP 1 DECIDE HOW YOU WILL TAKE TITLE TO THIS INVESTMENT

You will not be able to change title for one year from the date of closing, so choose carefully.

### Individual or Separate Property

- You plan to invest only in your personal name, not with a spouse or partner.
- If you are married and live in a Community Property State (AZ, CA, ID, LA, NV, NM, TX, WA, WI, PR), then your Spouse must sign a Community Property Waiver in front of a Notary. Instructions will be provided.

### Joint or Community Property

- Both spouses / partners will need to execute the Subscription Documents and both will need to prove they are Accredited Investors.
- Plan to provide a unique email address for both spouses / partners.

### LLC or Corporation

- Gather and prepare to submit the fully executed Operating Agreement (LLC) or Articles of Incorporation & Minutes showing all signers (Corporation).
- All members/owners will need to prove they are Accredited Investors, if entity is not Accredited
- Prepare to send names of all signers and their unique email addresses for paperwork purposes.

**\*\*IF YOU HAVE A SOLO 401K LLC OR SD IRA LLC, THEN SUBMIT AS AN LLC\*\***

### Trust

- The key Trustee should initiate the investment paperwork.
- Gather and prepare to submit the fully executed Trust Agreement.
- Prepare to send names of all signers (typically the Trustees) and their unique email addresses.
- All equity owners will need to prove they are Accredited Investors if the Trust is not Accredited.

### Self Directed Retirement Account

- Ensure capital is ready to be wired from your Custodian prior to submitting paperwork.
- Know how you are required to take Title based on Custodian instructions and locate the Tax ID (EIN) you are required to use for your investment.
- Gather and prepare to submit your Custodian's paperwork to initiate an investment.  
*Communications with Custodian will be your responsibility.*



## STEP 2 MOVE FUNDS PRIOR TO SUBMITTING PAPERWORK

- Ensure investment amount is in account from which you will wire to invest. Familiarize yourself with the wire process of the account you are using.
- Be aware of mail time and check clearing impacts.

## STEP 3

### GATHER PROOF OF ACCREDITED INVESTOR STATUS

- [Download the Third Party Verification Letter here](#)
- Have Attorney / Accountant / Broker-Dealer / Investment Advisor sign the letter and return it for all equity owners based on title.
- Keep the letter(s) to submit to Verify Investor during the investment process.

## STEP 4

### SET ASIDE TIME AFTER THE WEBINAR TO COMPLETE INVESTMENT PAPERWORK

- Set aside at least 1 hour to complete the paperwork necessary to Invest.
- Once submitted, you will receive an email immediately requesting that your reply with key information. **Investment Paperwork will not be processed until you respond to this email.**
- Be prepared to respond to emails within 24 hours when additional items are requested.



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