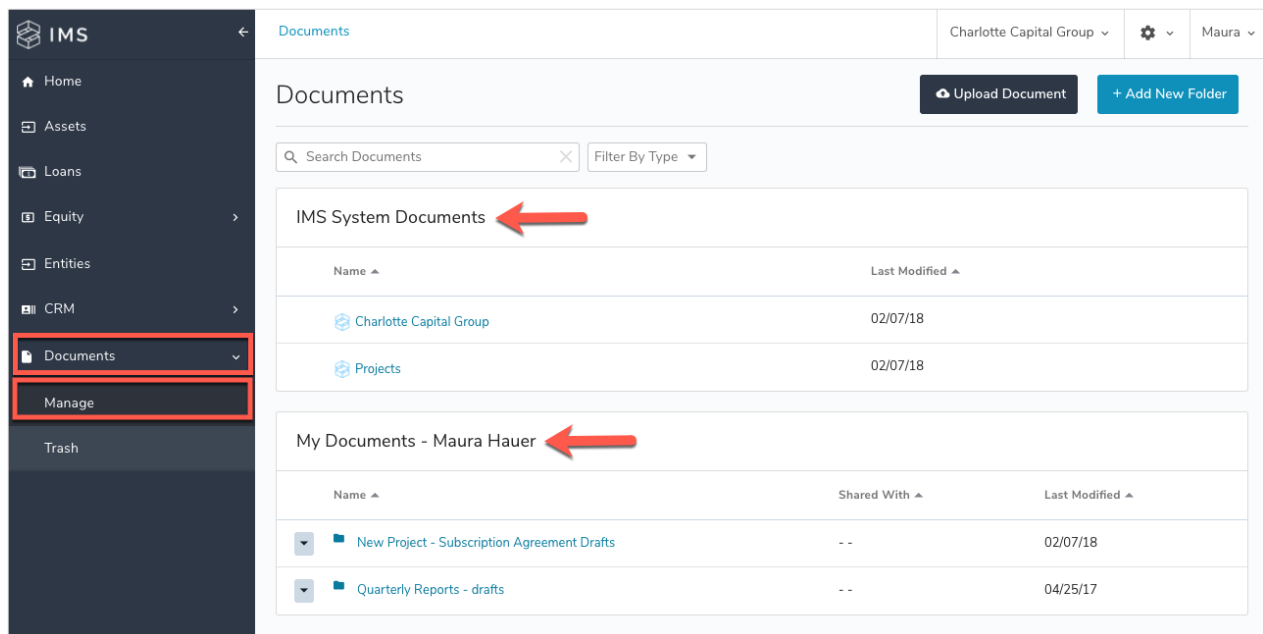


How to Upload Investor Documents

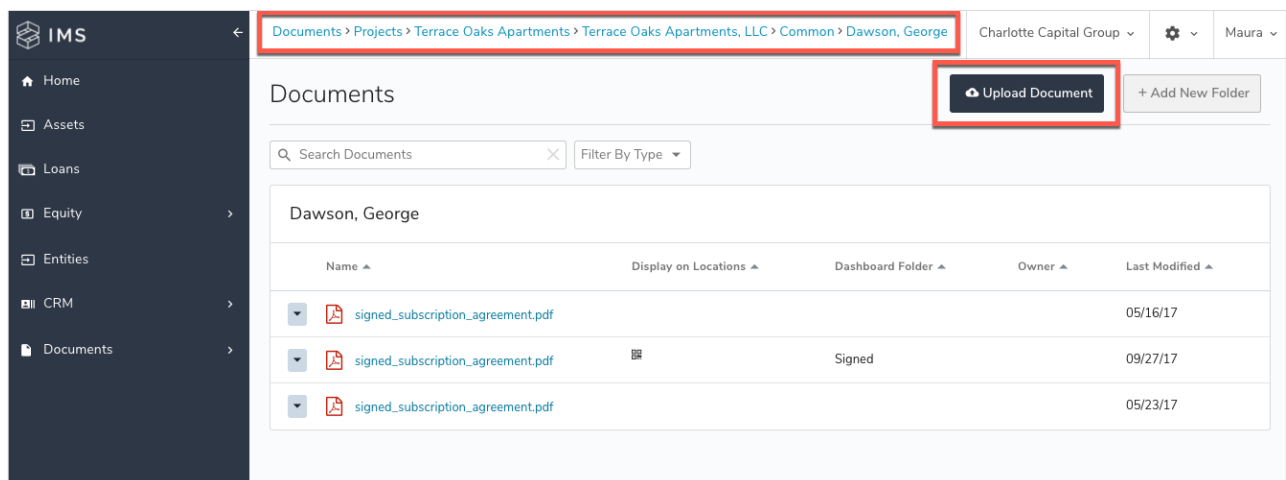
(Updated 02/07/2018)

Click on **Documents, Manage** on the **Site Navigation Panel** on the left. This view will show you **Auto Generated Folders**. The **IMS System Documents** section contains a folder called **Projects** which will house all associated investor folders and documents. The Company documents (under your company name) will house all internal company documents (such as Waterfall-Audit files, broker, and property management information). The **My Documents – [Name]** folder is a location where the Team Member can load documents for their internal use or to coordinate with their CSM or other Team Members.



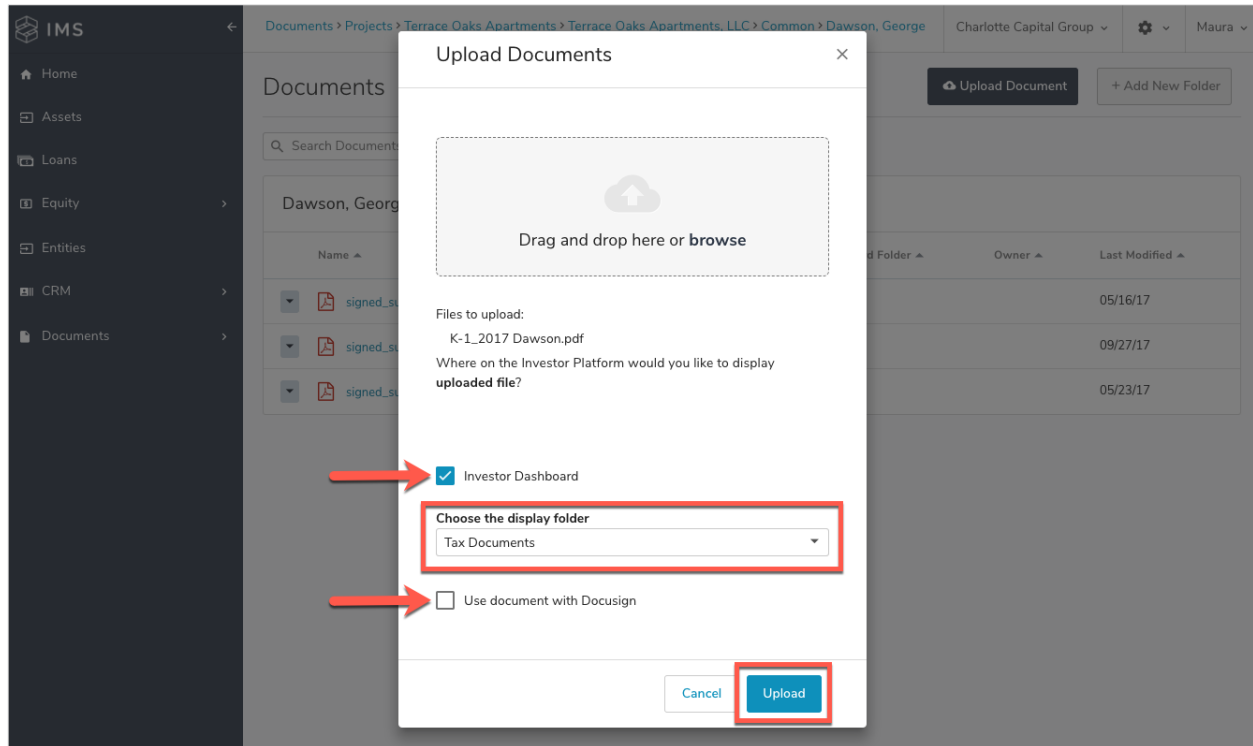
The screenshot shows the IMS interface. On the left is a dark navigation menu with 'Documents' and 'Manage' highlighted with red boxes. The main content area is titled 'Documents' and includes a search bar and a 'Filter By Type' dropdown. Below this are two sections: 'IMS System Documents' and 'My Documents - Maura Hauer'. Red arrows point to the 'IMS System Documents' header and the 'My Documents - Maura Hauer' header. The 'IMS System Documents' section contains a table with columns 'Name' and 'Last Modified', listing 'Charlotte Capital Group' and 'Projects'. The 'My Documents - Maura Hauer' section contains a table with columns 'Name', 'Shared With', and 'Last Modified', listing 'New Project - Subscription Agreement Drafts' and 'Quarterly Reports - drafts'.

Click on the **Projects** Folder and navigate to the Desired Project folder, Entity, and Equity Class (if applicable.) Note: The Documents section is structured like the project org chart. Select the Investor you want to upload a document for. Click **Upload Document**.

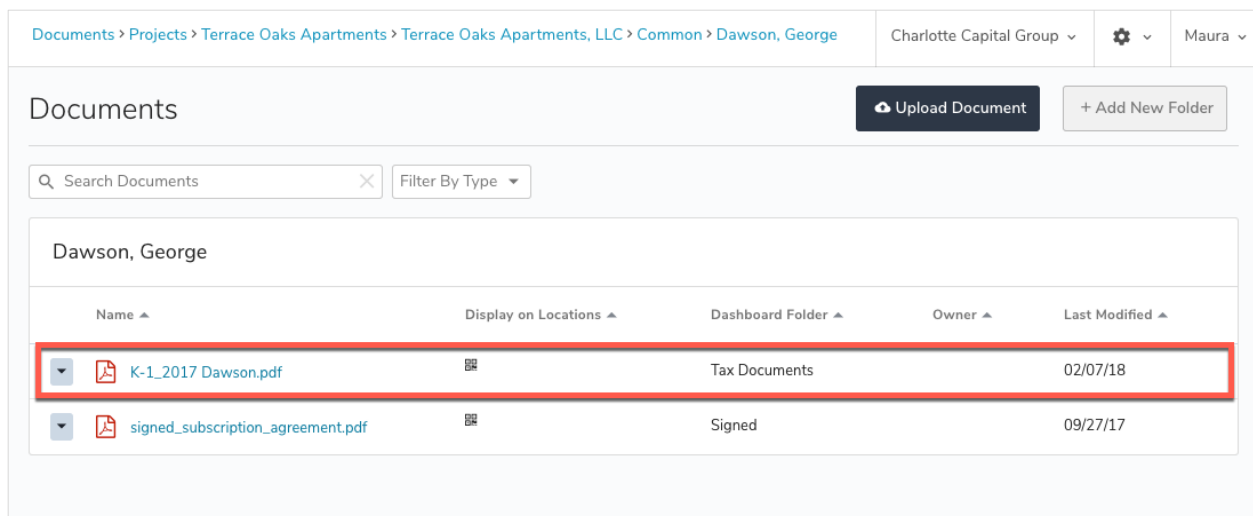


The screenshot shows the IMS interface with a breadcrumb trail at the top: 'Documents > Projects > Terrace Oaks Apartments > Terrace Oaks Apartments, LLC > Common > Dawson, George'. The 'Documents' section is titled 'Dawson, George'. A red box highlights the 'Upload Document' button in the top right corner. Below the breadcrumb trail is a search bar and a 'Filter By Type' dropdown. The main content area shows a table with columns 'Name', 'Display on Locations', 'Dashboard Folder', 'Owner', and 'Last Modified', listing three 'signed_subscription_agreement.pdf' files.

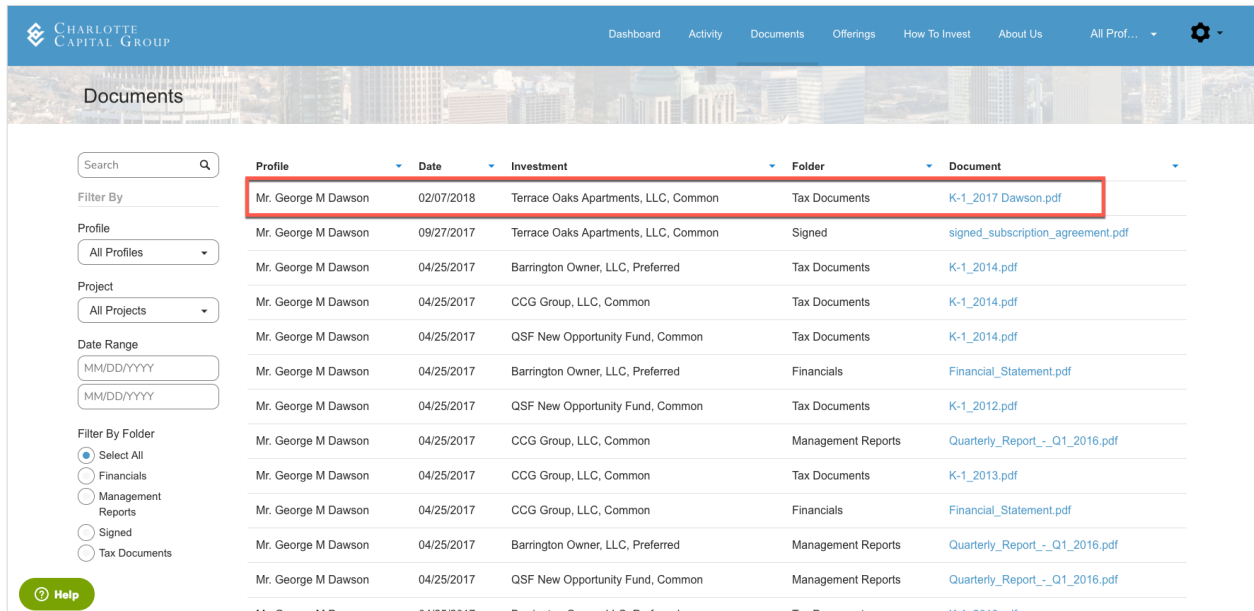
Drag and drop the desired document(s) or browse. Choose where you would like this file to be displayed on the Investor Dashboard. If you choose Investor Dashboard, choose the desired folder. Click **Upload**. Click **Done**.



You will see your newly added document(s) added to the list.



Your investors will see these documents in their **Documents** tab. Here, they can view, save, or print their documents.



CHARLOTTE CAPITAL GROUP | Dashboard | Activity | Documents | Offerings | How To Invest | About Us | All Prof... | Settings

Documents

Search []

Filter By

Profile: All Profiles

Project: All Projects

Date Range: MM/DD/YYYY

Filter By Folder:

- Select All
- Financials
- Management Reports
- Signed
- Tax Documents

Profile	Date	Investment	Folder	Document
Mr. George M Dawson	02/07/2018	Terrace Oaks Apartments, LLC, Common	Tax Documents	K-1_2017 Dawson.pdf
Mr. George M Dawson	09/27/2017	Terrace Oaks Apartments, LLC, Common	Signed	signed_subscription_agreement.pdf
Mr. George M Dawson	04/25/2017	Barrington Owner, LLC, Preferred	Tax Documents	K-1_2014.pdf
Mr. George M Dawson	04/25/2017	CCG Group, LLC, Common	Tax Documents	K-1_2014.pdf
Mr. George M Dawson	04/25/2017	QSF New Opportunity Fund, Common	Tax Documents	K-1_2014.pdf
Mr. George M Dawson	04/25/2017	Barrington Owner, LLC, Preferred	Financials	Financial_Statement.pdf
Mr. George M Dawson	04/25/2017	QSF New Opportunity Fund, Common	Tax Documents	K-1_2012.pdf
Mr. George M Dawson	04/25/2017	CCG Group, LLC, Common	Management Reports	Quarterly_Report_-_Q1_2016.pdf
Mr. George M Dawson	04/25/2017	CCG Group, LLC, Common	Tax Documents	K-1_2013.pdf
Mr. George M Dawson	04/25/2017	CCG Group, LLC, Common	Financials	Financial_Statement.pdf
Mr. George M Dawson	04/25/2017	Barrington Owner, LLC, Preferred	Management Reports	Quarterly_Report_-_Q1_2016.pdf
Mr. George M Dawson	04/25/2017	QSF New Opportunity Fund, Common	Management Reports	Quarterly_Report_-_Q1_2016.pdf

[Help](#)