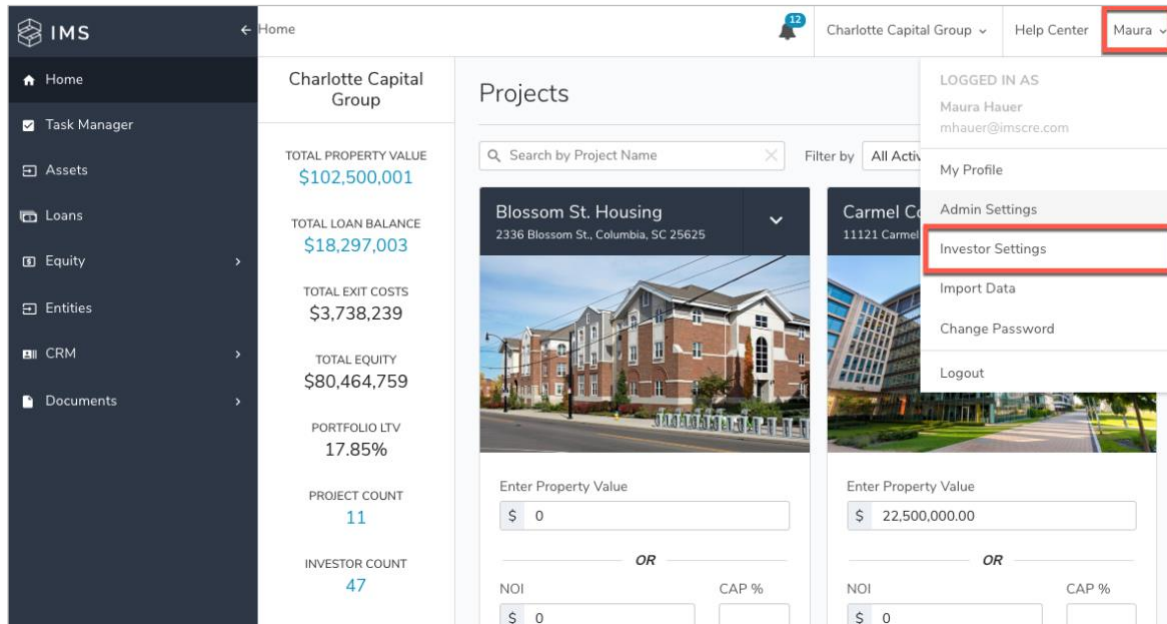
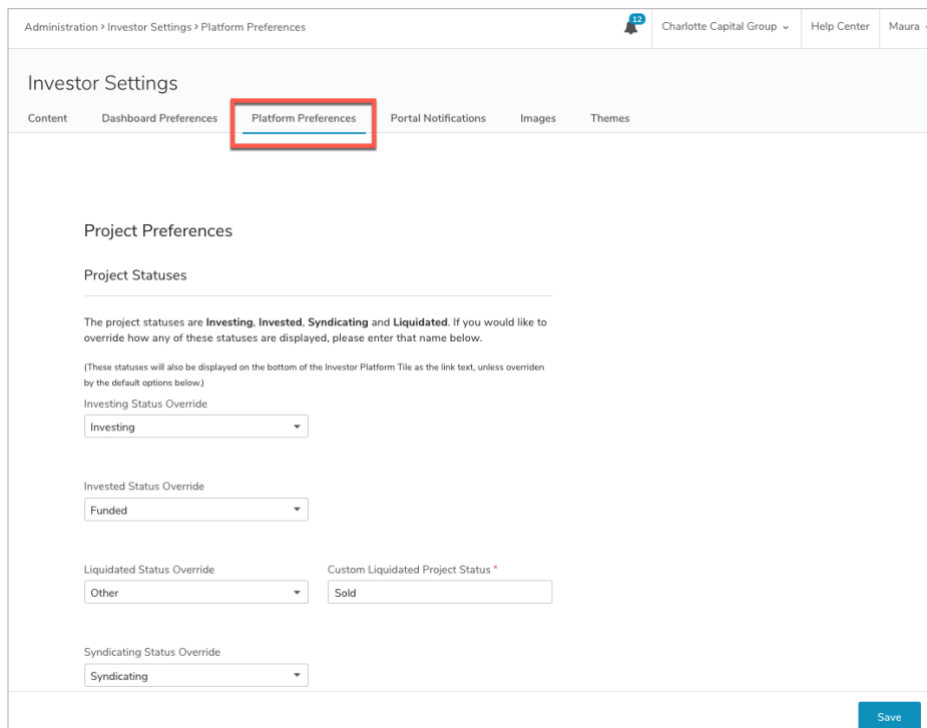


Platform Preferences Walkthrough (Updated 03/04/2019)

Step 1: Click your **name** at the top right. Click **Investor Settings**.



Step 2: Click the **Platform Preferences** tab at the top. Here, you will find Project Preferences, Investor Platform Tile Defaults, Emily Preferences, Investor Preferences, Waterfall Preferences, Platform Preferences, Deal Room/Investment Summary Preferences, and Investor Dashboard Preferences.



Project Preferences:

Here, you can choose project status names for Investing, Invested, Syndicating and Liquidated projects. The Other option will populate a field to the rate for a custom status name if it is not in the dropdown options.

*These statuses will also be displayed on the bottom of the Investor Platform Tile as the link text, unless overridden by the default options.

Project Preferences

Project Statuses

The project statuses are **Investing**, **Invested**, **Syndicating** and **Liquidated**. If you would like to override how any of these statuses are displayed, please enter that name below.

(These statuses will also be displayed on the bottom of the Investor Platform Tile as the link text, unless overridden by the default options below.)

Investing Status Override

Invested Status Override

Liquidated Status Override

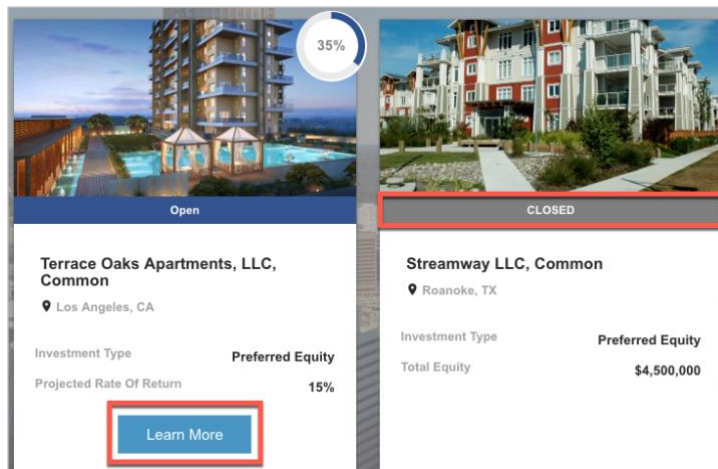
Custom Liquidated Project Status *

Syndicating Status Override

Investor Platform Tile Defaults:

Investor Platform Tile Defaults

- Select if you would like to display **Learn More** on your raise tiles as the link text for **Investing** raises.
- Select if you would like to display **Closed** on your raise tiles as the link text for **Invested** and **Liquidated** raises.




Email Preferences:


Email Preferences

Select if you would like to allow **investment email confirmations** to be sent when an investment is successfully placed.

Investment Confirmation

**Charlotte Capital Group**
[Show Details](#)

i Completed on Wednesday, February 21, 2018.



Dawn,

Thank you for committing to invest in **Terrace Oaks Apartments, LLC, Common**. You have completed the first step in the investment process. The **remaining two steps** are outlined below:

1. DELIVER FUNDS TO ESCROW

Please deliver funds to escrow as soon as possible by the method you selected (wire or check). Wires are strongly encouraged, because checks are subject to a 10-day hold to confirm the check clears and is not subject to reversal by your bank. Therefore, checks must be received at least 14 days before the investment is scheduled to close.

Make checks payable to **Terrace Oaks Apartments, LLC** and include a note with your name, phone number, and email address in case we have any questions.

Check instructions:

Mailing address for checks (made out to Terrace Oaks Apartments, LLC):

- Charlotte Capital Group
- [Redacted]

2. COMPLETE THE ACCREDITATION PROCESS

We will contact you if we need to update your accredited investor status.

In the meantime, you may monitor your investment status at any time on your investor dashboard [here](#).

If you have any questions, please do not hesitate to contact our live customer support specialists at **704-209-7511**.

Thank you,

Charlotte Capital Group

[Visit Dashboard](#)

Investor Preferences:

Here, you can choose if you would like to send batch, individual, or disable distribution emails. You can also choose your preferred contribution payment types, and methods that an investor can receive distribution payments.

Investor Preferences

Distribution Notification Emails
Send distribution notification emails to investors.

Enable Batch Distribution Emails ⓘ

Enable Individual Emails ⓘ

Disable Distribution Emails

Preferred Contribution Payment Types
Identify the payment method(s) in which an investor can make contribution payments.

Check Wire Transfer

Payment Distributions
Specify the payment method(s) in which an investor can receive a distribution payment.

ACH Check Wire Transfer

Waterfall Preferences:

Here, you can choose your rounding preference and whether any excess funds will be retained or distributed after rounding. You can also choose when you would like your preferred return accrual calculation and when you would like to display your unpaid preferred returns.

Waterfall Preferences

How would you like to round?

To the nearest penny (default)

To the nearest dollar

After rounding, will excess funds be retained or distributed?

Distribute to remaining investors until fully distributed - from largest to smallest (default)

Reduce distribution amount

When would you like to begin your preferred return accrual calculation?

Note changing the preferred accrual calculation method after distributions have been processed may result in a recalculation of preferred returns.

Investment Date (default) ⓘ

Investment Date +1 ⓘ

When would you like to display your unpaid preferred returns?

Prior Business Day (default)

Prior Month End

Last Distribution End Date

Platform Preferences:

Here, you can choose if you would like to enable a How to Invest or Sign Up link on the Investor Platform. You can also choose your Distribution Amount Display preference, the default page that investors see upon login, and your preference on the dollar values display.

Platform Preferences

Investor Platform Preferences

Select if you would like to enable the **How to Invest** link on your investment platform.

Select if you would like to enable the **Sign Up** link on the Investor Platform.

Distribution Amount Display

Select if you would like to display the total Distribution Amount and an itemized list of Distribution Sub-types on your Investor's Activity Log.

Show total Distribution Amount Only

Show total Distribution Amount and itemized list of Distribution Sub-types

Select the default page to direct investors to upon login:

Investor Dashboard*

Offerings

*Will only apply to investors that have investments on the platform

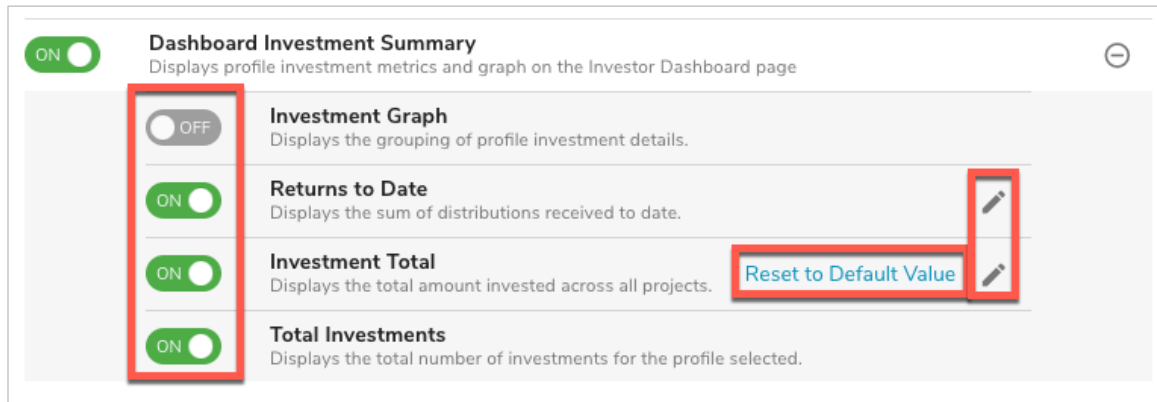
Select how you would like to display dollar values to your investors:

Display values rounded to the nearest whole dollar (default)

Display values with cents

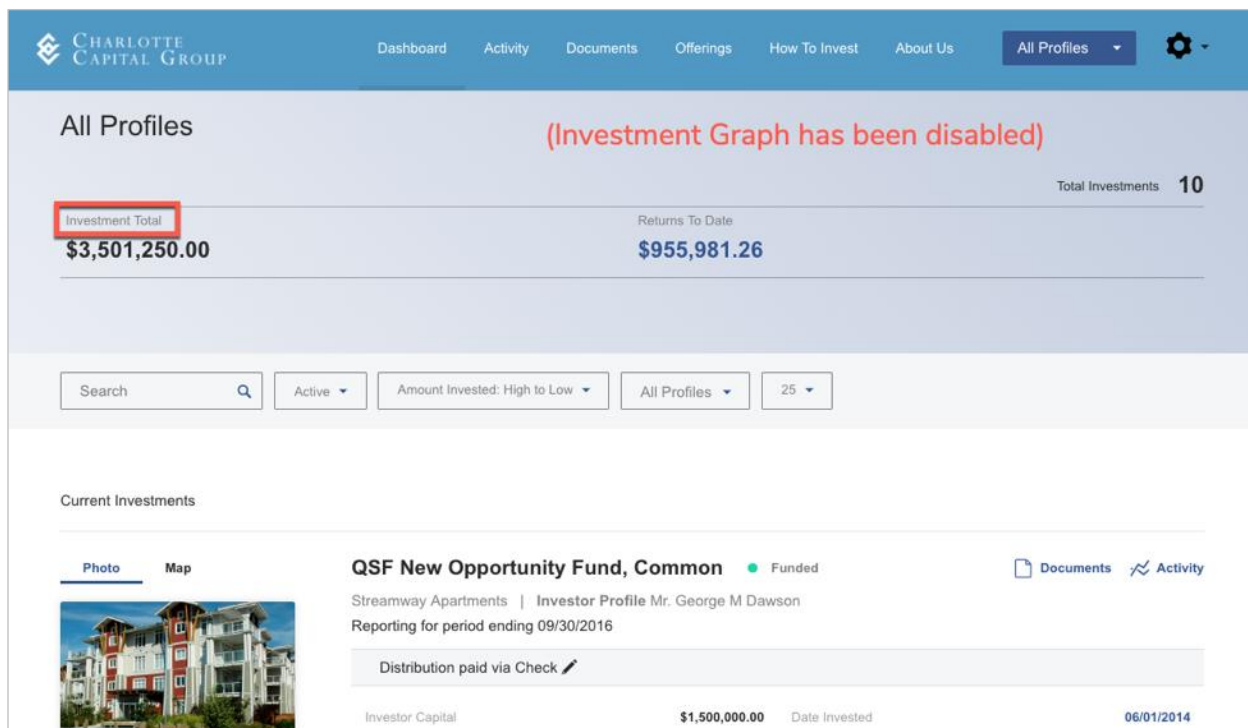
Dashboard Investment Summary Options:

Here, you can select if you would like to toggle on/off the Investment Graph, Returns to Date, Total Investment Amount, and Total Investments on the top of the Investor Dashboard. You also have the option to rename Returns to Date and Total Investment Amount.



Dashboard Investment Summary
Displays profile investment metrics and graph on the Investor Dashboard page

- Investment Graph**
Displays the grouping of profile investment details. OFF
- Returns to Date**
Displays the sum of distributions received to date. ON
- Investment Total**
Displays the total amount invested across all projects. ON [Reset to Default Value](#)
- Total Investments**
Displays the total number of investments for the profile selected. ON



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

All Profiles (Investment Graph has been disabled) Total Investments 10

Investment Total \$3,501,250.00 **Returns To Date** \$955,981.26

Search [] Active [] Amount Invested: High to Low [] All Profiles [] 25 []

Current Investments

QSF New Opportunity Fund, Common ● Funded Documents Activity

Streamway Apartments | Investor Profile Mr. George M Dawson
Reporting for period ending 09/30/2016

Distribution paid via Check ✎

Investor Capital \$1,500,000.00 Date Invested 06/01/2014

Deal Room/Investment Summary Preferences:

Here, you can select your preferences for Investor Platform Deal Room and Investment Summary Pages.

Deal Room/Investment Summary Preferences

Select the preferences (enabled or disabled) for Investor platform deal room and investment summary pages:

Preferred Return Internal Rate of Return Cash on Cash

Investor Dashboard Preferences:

Here, you can enable or disable specific preferences to be included in the summary section for the Investor Dashboard or choose to display preferences for Investor Dashboard Investment Summary Cards.

Investor Dashboard Preferences

Select (enabled or disabled) to include the following in the summary section for Investor platform dashboard:

Weighted Average Rate of Return

Select the default display (enabled or disabled) preferences for Investor platform investment summary dashboard cards:

Apply Investor Dashboard Card Preferences To All Cards [?]