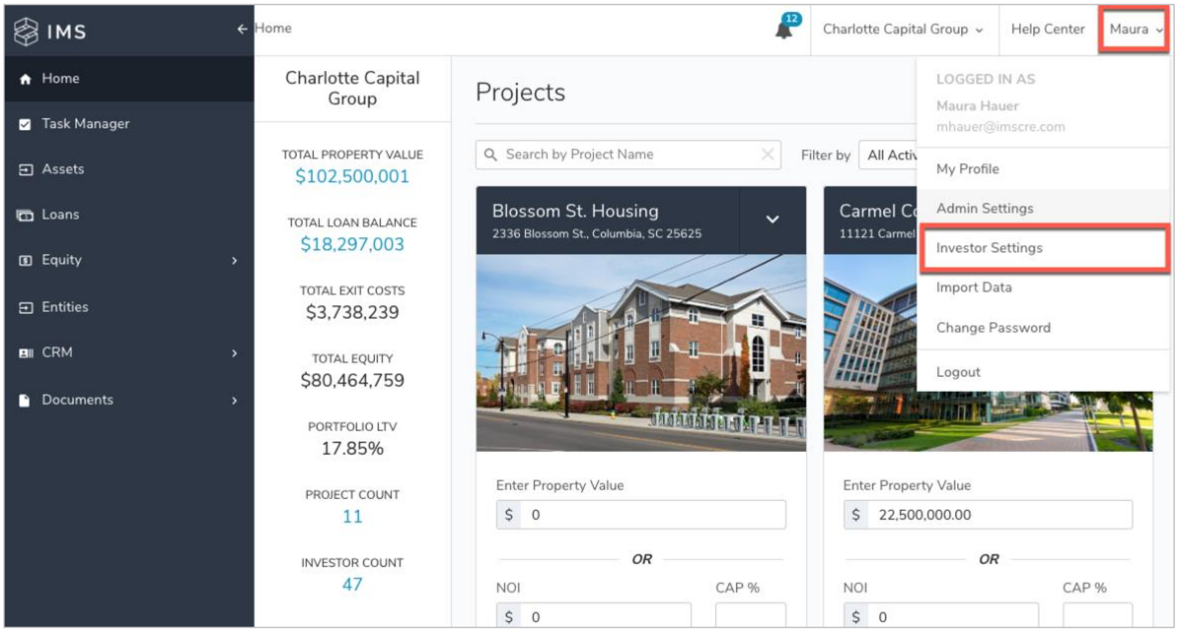
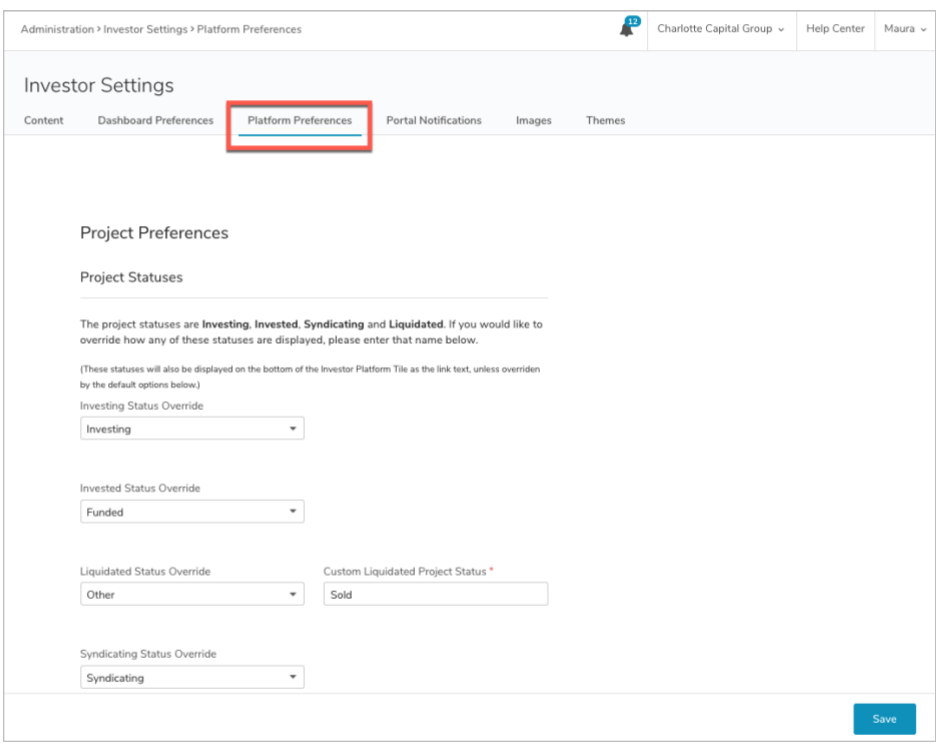
Platform Preferences Walkthrough
(Updated 03/04/2019)

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



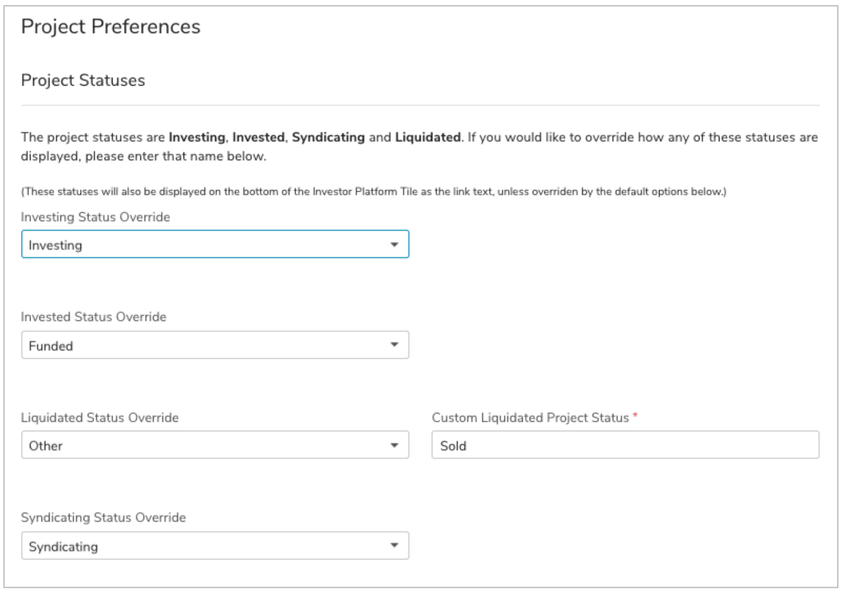
Step 2: Click the **Platform Preferences** tab at the top. Here, you will find Project Preferences, Investor Platform Tile Defaults, Emily Preferences, Investor Preferences, Waterfall Preferences, Platform Preferences, Deal Room/Investment Summary Preferences, and Investor Dashboard Preferences.



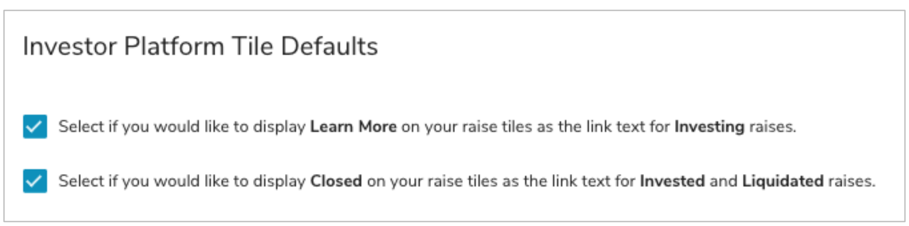
Project Preferences:

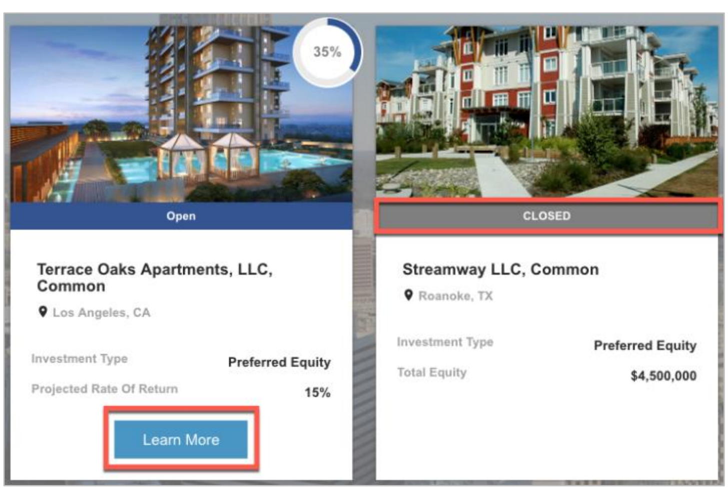
Here, you can choose project status names for Investing, Invested, Syndicating and Liquidated projects. The Other option will populate a field to the rate for a custom status name if it is not in the dropdown options.

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



Investor Platform Tile Defaults:





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

CC **Charlotte Capital Group**

Show Details

Completed on Wednesday, February 21, 2018.

CHARLOTTE CAPITAL GROUP

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
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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**.

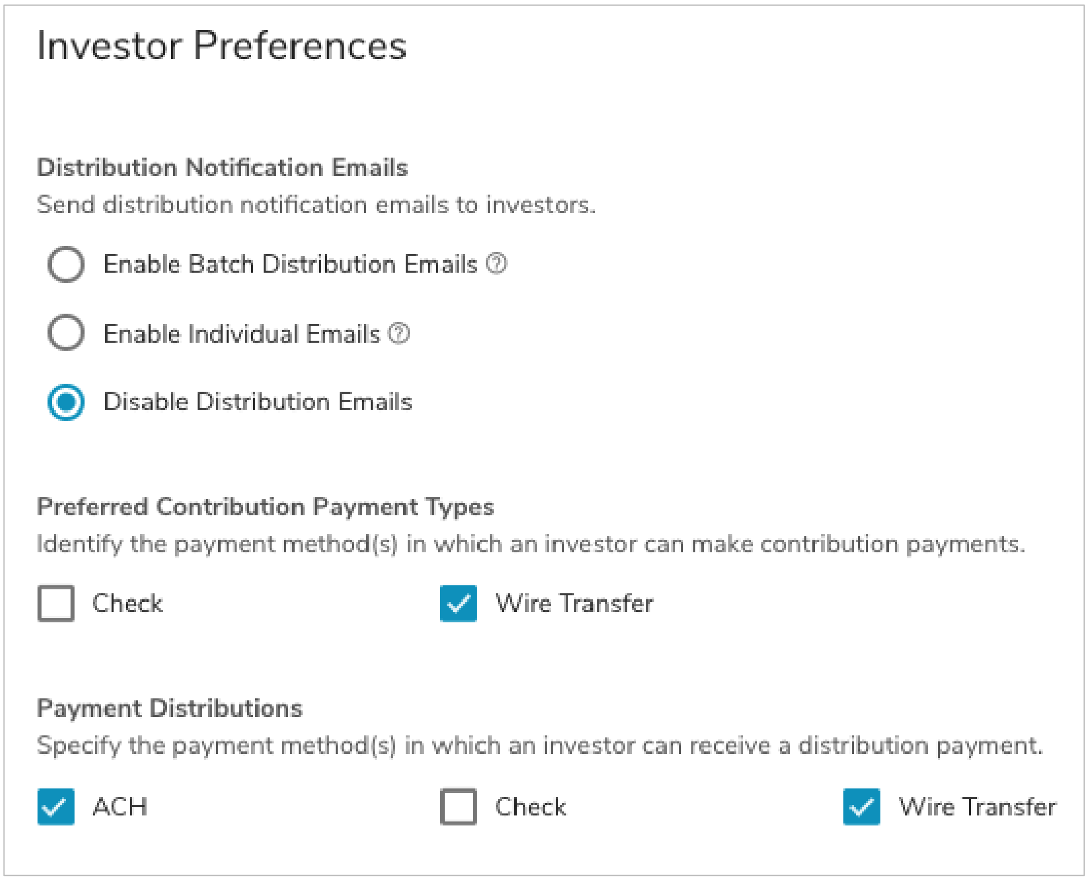
Thank you,

Charlotte Capital Group

Visit Dashboard

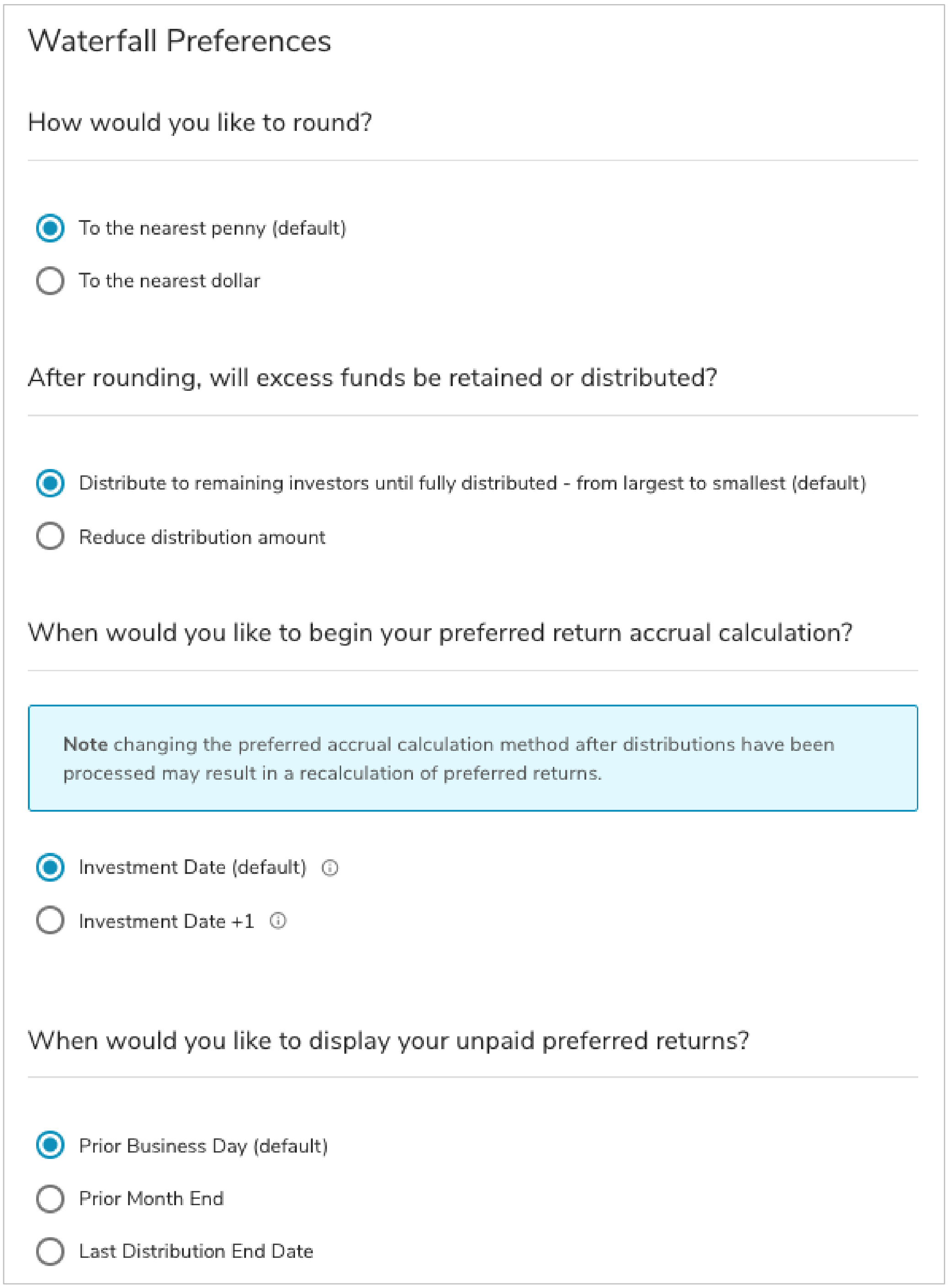
Investor Preferences:

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.



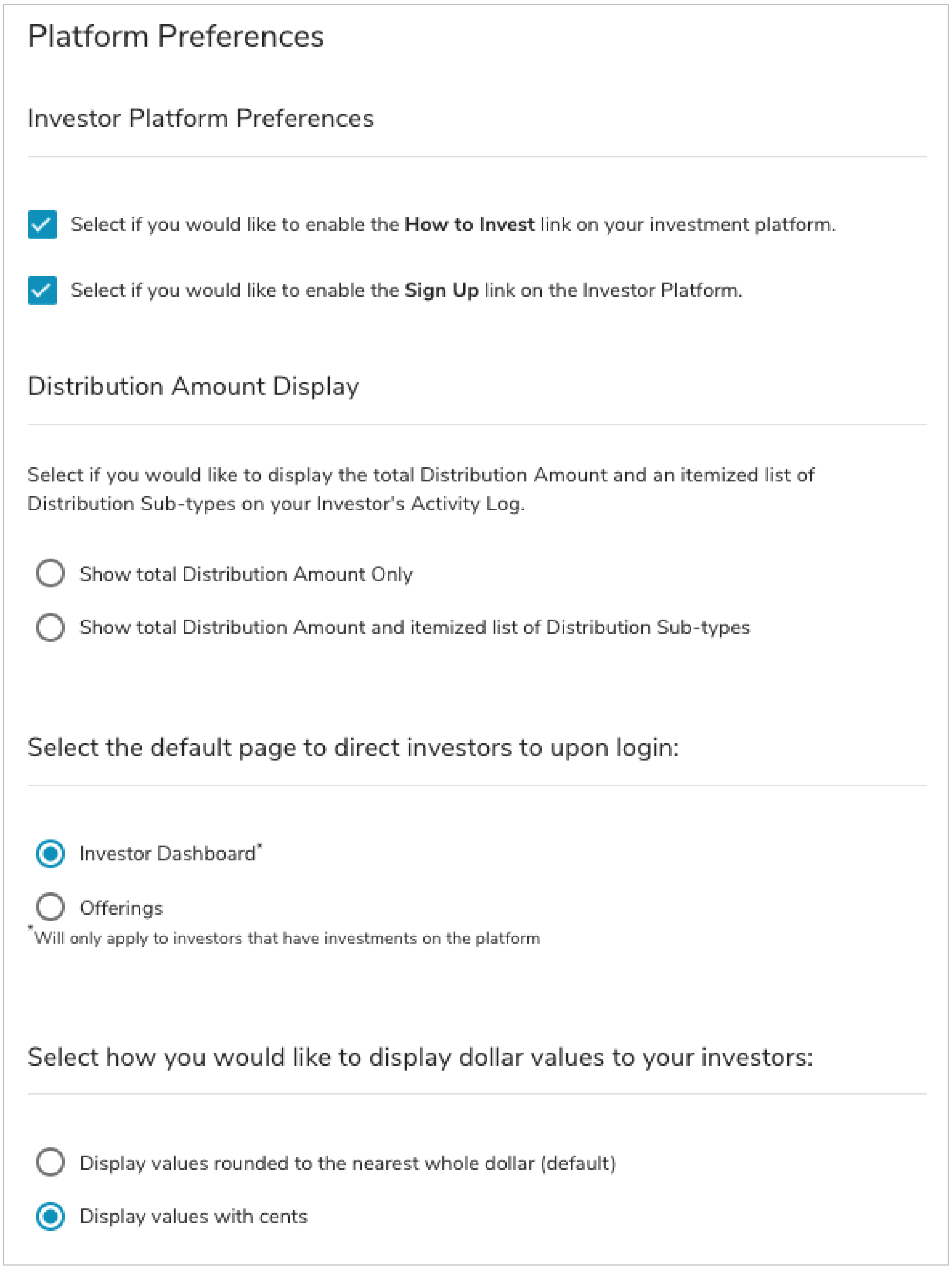
Waterfall Preferences:

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.



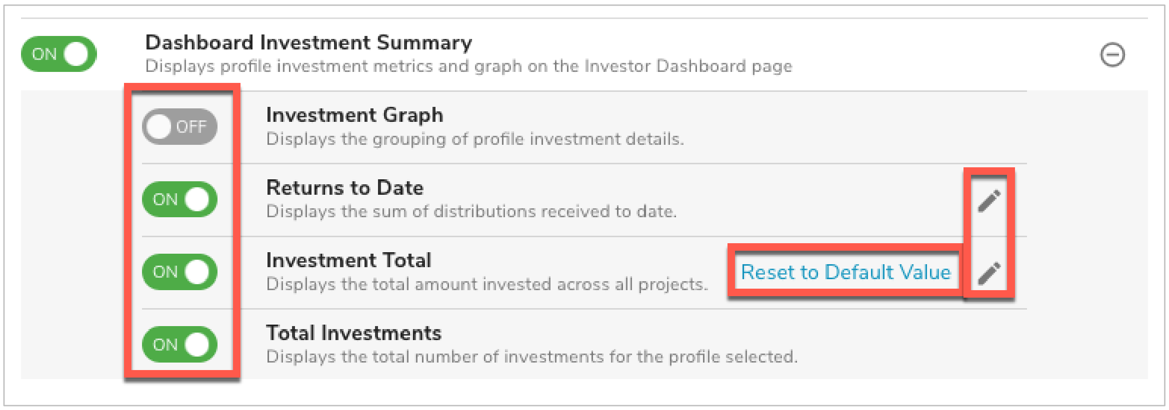
Platform Preferences:

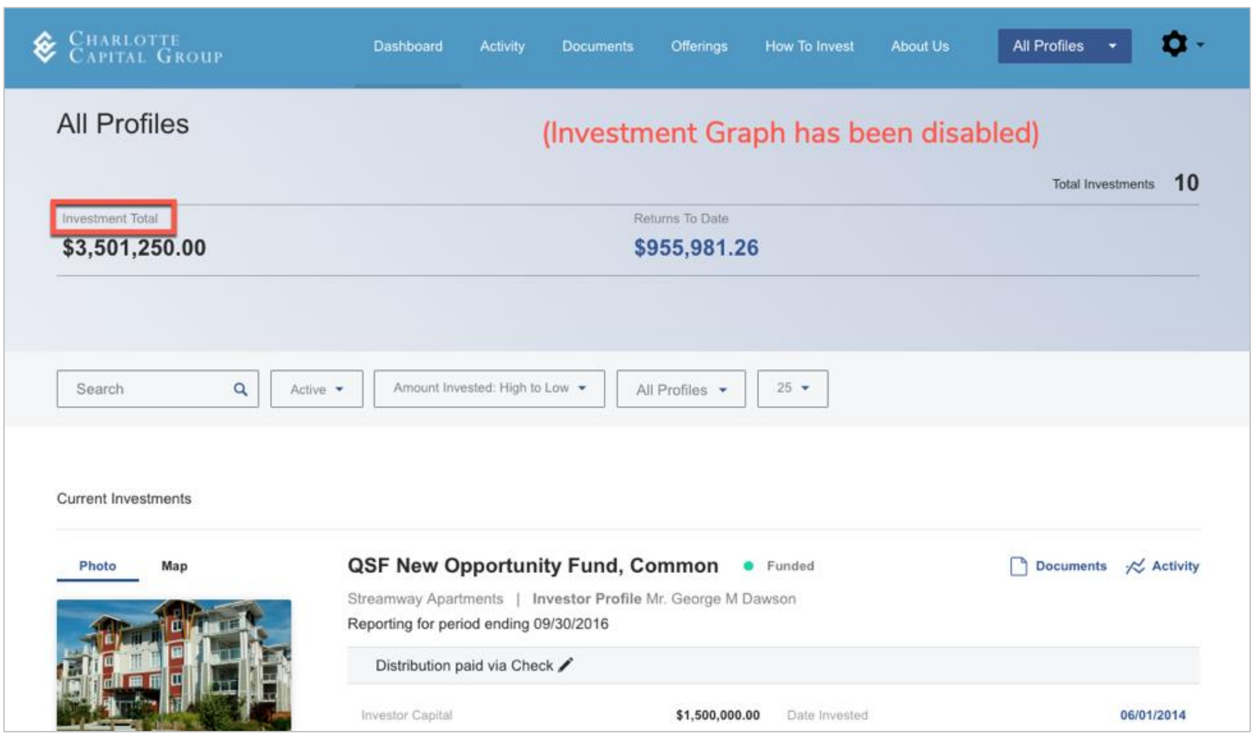
Here, you can choose if you would like to enable a How to Invest or Sign Up link on the Investor Platform. You can also choose your Distribution Amount Display preference, the default page that investors see upon login, and your preference on the dollar values display.



Dashboard Investment Summary Options:

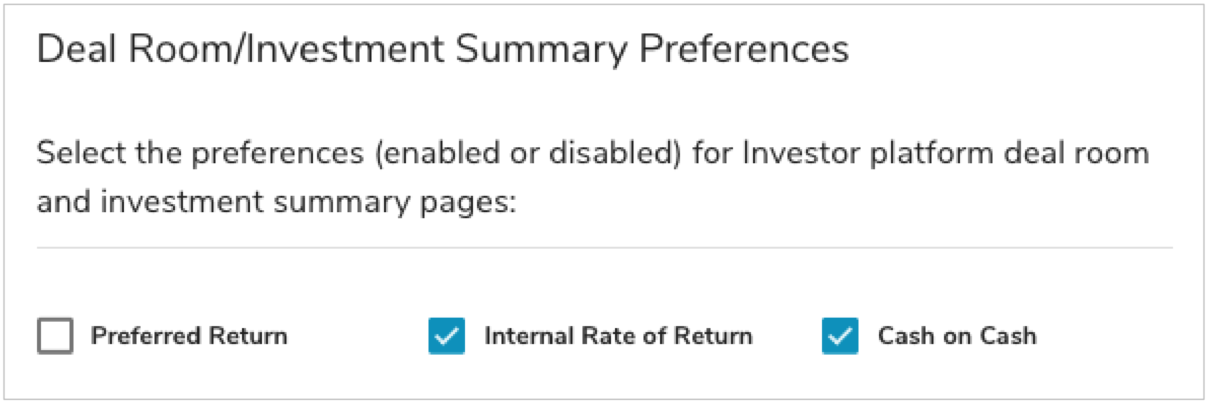
Here, you can select if you would like to toggle on/off the Investment Graph, Returns to Date, Total Investment Amount, and Total Investments on the top of the Investor Dashboard. You also have the option to rename Returns to Date and Total Investment Amount.





Deal Room/Investment Summary Preferences:

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



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.