IMS Investor Support

As part of IMS' commitment to a world-class investor experience, we offer direct technical support to your investors depending on your subscription terms. If this is part of your package, and if you would like, we will assist your investors with portal navigation and technical troubleshooting. This document outlines the value-add services that IMS Investor Support provides as well as our overall policies for Investor Support.

Log-In Assistance for Your Investors

Our team will:

Help with Account Set-up

- Resend an invitation to an investor in your CRM who has not completed the account set-up process after you have formally launched to your investors.
- Assist investors who have received an invitation or a CRM email with a portal link in the initial account set up process.

Help with Password Resets

- Assist if the standard password reset process is not successful or they request additional assistance. Upon verification of the account name and the email address associated with the account we will resend the password reset email from the CRM to the email on record and guide the investor through the reset process.
- If this is not successful, we will reset the account to a new randomly generated password, which we will email to the account on record.
- Troubleshoot more complex log-in problems relating to browser and firewall issues.

We will refer to you:

- Requests to add or edit profile connections
- Requests from new investors (not already in the CRM) to set up accounts.
- Investors who are unable to access the email account on record.
- Requests for log in assistance for third parties, including spouses and family members who are trying to log into a family member's account.

- Any investors who are unable to confirm the name or the email address associated with the account.

Investor Portal Navigation Assistance

Our team will:

- Help an investor find documents on the portal, including their K1s during tax season.
- Provide explanation about where various pieces of information can be found on the Investor Portal.
- Assist investors with the process of updating their own profile information, including ACH and banking information, if this is enabled on your account.
- Walk investors through the process of adding a new investment vehicle to their profile.

We will refer to you:

- Investors who are unable or unwilling to access their K1s or other documents through the online portal. ***Given the sensitive information on the K1 form, we will never email these***
- Investors who are unable or unwilling to update their own banking or tax ID information.

Sales Offering and Investment Technical Assistance

Our team will:

- Guide investors through the Sales Offering wizard and assist with eSignature technical troubleshooting, if needed.
- Troubleshoot any technical issues that arise during the investment process.
- Inform the investor about the eSignature workflow, including whether there are countersignatures pending on a document sent via IMS.

We will refer to you:

- Investors who are unable or unwilling to place an investment using the IMS sales offering tool.
- Any investor questions regarding the details of the investment itself.
- Requests for wiring instructions.
- All investor questions regarding how to interpret a document that has been loaded to the portal.

- Any requests to make changes to an investment that is already accepted or in progress.
- Any requests to initiate a transfer.
- Any questions about distributions, aside from advising the investor where they can locate this information within the IMS Investor Portal.

Please don't hesitate to reach out to Customer Support with any questions at support@imscre.com