



## Account Agreement

This account agreement (“**Agreement**”) is entered between the undersigned person or entity (“**Account Owner**,” the “**Signatory**,” you, and your as the context requires) and CrowdStreet, Inc. (“**Crowd Street**”), CrowdStreet Capital, LLC (“**Crowd Street Capital**”), and their agents and assigns (collectively referred to as “**Crowd Street**,” us, we, and our as the context requires) in connection with your opening of a Crowd Street account (an “**Investing Account**”) to select, complete, and manage your investments.

Crowd Street operates an online platform (the “**Crowd Street Platform**”). Crowd Street Capital is a FINRA-licensed broker-dealer that provides brokerage services in connection with certain investment opportunities through the Crowd Street Platform. To open an Investing Account with Crowd Street, please carefully review the following information you provided during your Investing Account setup and additional terms and disclosures linked below and complete this Agreement.

We are required to obtain information requested in this Agreement to comply with federal laws and regulations. The information referenced in this Agreement also helps us more fully understand your investment profile, objectives, and experience and identify if an investment may be suitable for you. Please promptly notify us if any of the following information changes by updating your Crowd Street Investing Account at [crowdstreet.com](https://crowdstreet.com).

For legal entities, we are required to collect information for all beneficial owners and at least one control person. A beneficial owner is defined as a natural person who has 25% or more ownership in the legal entity. A control person (“Authorized Member”) is defined as a natural person with significant responsibility to control, manage, or direct a legal entity customer, including an executive officer, a senior manager or any other individual who regularly performs similar functions. A Legal Entity is defined as a Trust, LLC, Corporation, or any other entity created by filing a document with the state.

### Account Summary

Legal Name of Individual or Entity (if investing with an entity)		
Account Type	Subtype	
Tax Payer ID	Tax Rate (optional)	
Account Mailing Address		
City	State	Zip Code

**Account Suitability**

Interested in making aggressive and/or moderately aggressive investments?	Interested in making investments with a targeted hold period over three years?
Annual income:	Net worth:
Liquid net worth:	Qualified purchaser:
Investment objectives:	Primary source of funds:

**Trusted Contact (optional)**

A trusted contact is intended to be a resource for Crowd Street to contact in limited circumstances, such as if there is a concern about activity in your account and we have been unable to get in touch with you. By choosing to provide information about a trusted contact person, you authorize us to contact the trusted contact person listed on this account agreement and disclose information about your account to that person in the following circumstances: to address possible financial exploitation, to confirm the specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee or holder of a power of attorney, or as otherwise permitted by FINRA Rule 2165. A trusted contact must be a natural person age 18 or older.

Name	Relationship
Email Address	Phone Number

**Account Holder / Authorized Member 1**

Legal Name		Email	
Social Security Number (SSN)	Date of Birth	Mobile Phone	
Primary Residential Address			
City		State	Zip Code
Country of Citizenship		Residence Status	Visa Type
Marital Status			
Occupation	Industry	Employer Name	
Employer Address			
Are you or anyone in your immediate family employed by or registered with a broker-dealer, investment advisor, hedge fund, exchange or other financial services firm ?		How are you associated with a securities industry or financial services regulator?	
Do you have permission and authorization from your employer?		Is your employer requesting duplicate statements?	
Annual Income	Liquid Net Worth	Net Worth	
Authorized Member?	Beneficial Owner (25%+)	Ownership Percentage	

**Account Holder / Authorized Member 2**

Legal Name		Email	
Social Security Number (SSN)	Date of Birth	Mobile Phone	
Primary Residential Address			
City		State	Zip Code
Country of Citizenship		Residence Status	Visa Type
Marital Status			
Occupation	Industry	Employer Name	
Employer Address			
Are you or anyone in your immediate family employed by or registered with a broker-dealer, investment advisor, hedge fund, exchange or other financial services firm ?		How are you associated with a securities industry or financial services regulator?	
Do you have permission and authorization from your employer?		Is your employer requesting duplicate statements?	
Annual Income	Liquid Net Worth	Net Worth	
Authorized Member?	Beneficial Owner (25%+)	Ownership Percentage	

**Account Holder / Authorized Member 3**

Legal Name		Email	
Social Security Number (SSN)	Date of Birth	Mobile Phone	
Primary Residential Address			
City		State	Zip Code
Country of Citizenship		Residence Status	Visa Type
Marital Status			
Occupation	Industry	Employer Name	
Employer Address			
Are you or anyone in your immediate family employed by or registered with a broker-dealer, investment advisor, hedge fund, exchange or other financial services firm ?		How are you associated with a securities industry or financial services regulator?	
Do you have permission and authorization from your employer?		Is your employer requesting duplicate statements?	
Annual Income	Liquid Net Worth	Net Worth	
Authorized Member?	Beneficial Owner (25%+)	Ownership Percentage	

**Account Holder / Authorized Member 4**

Legal Name		Email	
Social Security Number (SSN)	Date of Birth	Mobile Phone	
Primary Residential Address			
City		State	Zip Code
Country of Citizenship		Residence Status	Visa Type
Marital Status			
Occupation	Industry	Employer Name	
Employer Address			
Are you or anyone in your immediate family employed by or registered with a broker-dealer, investment advisor, hedge fund, exchange or other financial services firm ?		How are you associated with a securities industry or financial services regulator?	
Do you have permission and authorization from your employer?		Is your employer requesting duplicate statements?	
Annual Income	Liquid Net Worth	Net Worth	
Authorized Member?	Beneficial Owner (25%+)	Ownership Percentage	



## Acknowledgments

- \_\_\_ **Truthfulness of Information Provided.** I represent and warrant that the information I have provided in this Agreement and each form that I have delivered to Crowd Street is current, true, correct and complete and does not omit to state any material fact necessary in order to make the statements contained in those documents not misleading; the address set forth in this Agreement is my true and correct legal address.
- \_\_\_ **Beneficial Ownership Certification.** For legal entities, I hereby certify that the information regarding the beneficial owners (natural persons with 25% or more ownership) and a control person (a natural person with significant responsibility to control, manage, or direct the legal entity) has been accurately provided for the legal entity named above. I understand that this information is being collected in accordance with regulatory requirements applicable to legal entities, including Trusts, LLCs, Corporations, and other entities created by filing a document with a state authority.
- \_\_\_ **Changes in Information.** I agree to notify Crowd Street of any change to the information provided in this Agreement promptly (in any event within thirty (30) calendar days of the change) by updating my Investing Account profile at CrowdStreet.com.
- \_\_\_ **Authorization.** I have the requisite power and authority to enter into this Agreement and to perform any and all obligations hereunder required by the Account Owner. To the extent the Account Owner is an entity, I, being the undersigned Authorized Member, am authorized to sign for and on behalf of the entity and enter into this Agreement and bind the entity to this Agreement.
- \_\_\_ **Further Documentation.** I agree, without further consideration, to prepare, execute, acknowledge, file, record, publish and deliver any other instruments, documents and statements and to take any other actions as Crowd Street may determine to be necessary or appropriate to effectuate and carry out the purposes of this Agreement.
- \_\_\_ **Electronic Consent.** I consent to the use of electronic records and signatures as set forth in Crowd Street's E-Sign Consent.
- \_\_\_ **Additional Terms and Disclosures.** I have received and reviewed, and I agree to be bound by, the following documents and disclosures, as in effect as of the date of this Agreement and as may be amended from time to time, which are incorporated into this Agreement by reference:

- |  |   |
|--|---|
| ⇒ <a href="#">Terms of Use</a>           | ⇒ <a href="#">Investment Risks Disclosure</a> |
| ⇒ <a href="#">Privacy Policy</a>         | ⇒ <a href="#">E-Sign Consent</a>              |
| ⇒ <a href="#">Regulatory Disclosures</a> | ⇒ <a href="#">Form CRS</a>                    |



### Account Agreement Signatures

Account Name	
Signature of Account Holder or Authorized Signatory	Date of Signature
Name of Authorized Signatory	Title/Capacity of Authorized Signatory
Signature of Joint Account Holder	Date of Signature
Name of Joint Account Holder	Title/Capacity of Joint Account Holder

**This Agreement is effective upon acceptance by Crowd Street:  
For Crowd Street Use Only:**

### Crowd Street Acceptance

Signature	Date
Name of Approving Principal	