CROWD STREET

CROWDSTREET CAPITAL, LLC
CLIENT RELATIONSHIP SUMMARY
September 10, 2026

CrowdStreet Capital, LLC is a broker-dealer registered with the SEC and a member of **FINRA/SIPC**. CrowdStreet Capital is a wholly owned subsidiary of CrowdStreet, Inc. and is under common control with CrowdStreet Advisors, LLC, a federally registered investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand those differences. Free and simple tools are available to research firms and financial professionals at **Investor.gov/CRS**, which also provides educational materials about broker-dealers, investment advisers, and investing.

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

Investment Services: We provide brokerage services to retail investors online, in connection with your purchase of securities offered through our website. We act as a placement agent and do not hold custody of client assets or securities, nor do we exercise discretionary authority.

Monitoring: We do not monitor your investments. Issuers of the securities in which you invest provide periodic reports and tax forms to you via our website.

Investment Authority: We do not provide personalized investment advice or recommendations. You are responsible for making your own investment decisions.

Limited Investment Offerings: We offer private placement securities and registered securities. The menu of products we offer is limited to those we make available through our website. We do not offer proprietary investment products and do not buy investments from you or sell investments to you from our own account.

Account Minimums and Other Requirements: No minimum is required to open an account. You must be an "accredited investor." Offerings typically have an investment minimum starting at $5,000; minimums vary by offering.

For more information about our offerings and services, please visit **crowdstreet.com/legal/disclosures**.

> ***QUESTIONS TO ASK YOUR BROKER:*** *Given my financial situation, should I choose a brokerage service? Why or why not? How will you choose investments to recommend to me? What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?*

WHAT FEES WILL I PAY?

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. Because we receive compensation when you invest in an offering, we have an incentive to make available offerings that pay us or our affiliates more compensation. We disclose the fees applicable to each investment on the webpage for that offering. See the 'Fees and Expenses' section on each offering page and the applicable offering documents. Common fee types include:

Sales Loads: You may pay an upfront commission, typically 1.5-3.5%. The issuer deducts the sales load from your invested amount up front and pays some or all of the sales load to us for our brokerage services.

Placement Fees: We may charge due diligence and placement fees up front to the issuer. The structure and amount of these fees vary by offering and are typically paid directly by the issuer. In some cases, the issuer

may pass these on to you, directly or indirectly. We may charge an upfront administrative fee to an issuer for custodial account set up and reconciliation services.

Ongoing Servicing Fees: Issuers pay us or our affiliate ongoing fees to provide shareholder services via our website.

Account Fees: We do not charge investors account fees.

Product-Level Fees and Costs: Funds and investments offered have complex internal fee and cost structures, with fees such as asset management fees and performance-based fees paid to fund managers, service fees paid to transfer agents, custodians, attorneys, accounting and tax professionals, and other operating costs and fees.

> ***QUESTIONS TO ASK YOUR BROKER:*** *Help me understand how these fees and costs might affect my investments. If I give you $10,000 to invest, how much will go to fees and costs, and how much will be invested for me?*

WHAT ARE YOUR LEGAL OBLIGATIONS TO ME WHEN PROVIDING RECOMMENDATIONS? HOW ELSE DOES YOUR FIRM MAKE MONEY AND WHAT CONFLICTS OF INTEREST DO YOU HAVE?

We ***do not*** provide recommendations. The way we make money creates some conflicts with your interests. You should understand and ask about these conflicts because they can affect the services we provide you. Here are examples to help you understand what this means: We and our affiliates receive compensation from issuers and other third parties in connection with offerings and related services, including when you make an investment. This creates an incentive for us to make available offerings that pay us or our affiliates more compensation. Sales loads paid to us reduce your invested capital and affect your returns over time. Fees that are paid to us by an issuer reduce the issuer's capital, lowering overall returns realized by investors.

> ***QUESTIONS TO ASK YOUR BROKER:*** *How might your conflicts of interest affect me, and how will you address them?*

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Our financial professionals are paid via salary, discretionary bonuses, and stock options. Bonuses may be tied to our overall revenue and performance, which creates an incentive to support offerings and services that increase our revenue. They do not receive transaction-based commissions for selling a particular investment.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No. Visit **investor.gov/crs** for a free and simple search tool to research us and our financial professionals.

> ***QUESTIONS TO ASK YOUR BROKER:*** *As a financial professional, do you have any disciplinary history? For what type of conduct?*

ADDITIONAL INFORMATION: For additional information about our services or to request up-to-date information or a copy of this relationship summary, visit **crowdstreet.com** or call (888) 432-7693.

> ***QUESTIONS TO ASK YOUR BROKER:*** *Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?*

CROWD STREET

EXHIBIT

SUMMARY OF MATERIAL CHANGES
FORM CRS RELATIONSHIP SUMMARY
Current Version Dated: September 10, 2026
Prior Version Dated: May 18, 2026

The following is a summary of material changes made to CrowdStreet Capital, LLC's Form CRS since the prior version dated May 18, 2026:

1. **Item 2.D(iv), Conversation Starter:** Revised the conversation starter from "How do you choose investments to recommend to me?" to "How will you choose investments to recommend to me?" to conform to the prescribed language in the Form CRS instructions.

2. **Item 3.B(i)a, Required Disclosure Block:** Revised the disclosure from "You should understand and ask us about these conflicts because they can affect the services we provide you. Here are some examples to help you understand what this means" to "You should understand and ask about these conflicts because they can affect the services we provide you. Here are examples to help you understand what this means" to conform to the prescribed language in the Form CRS instructions.

Except as described above, there were no other material changes to the Form CRS.