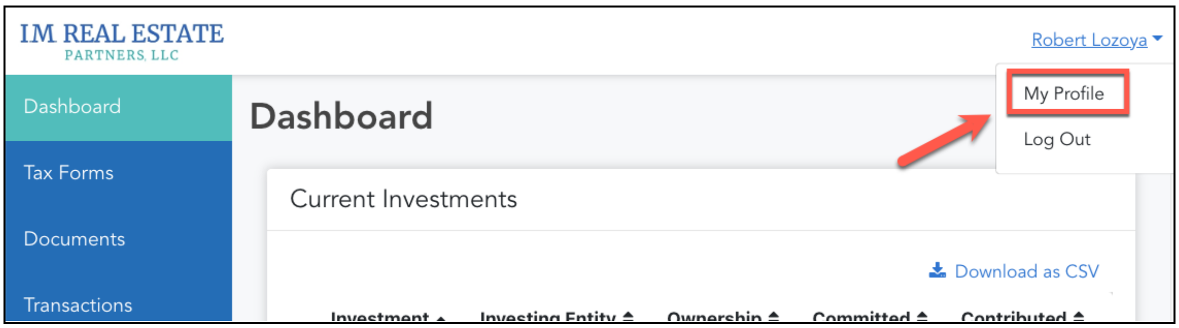
appfolio Investment Management

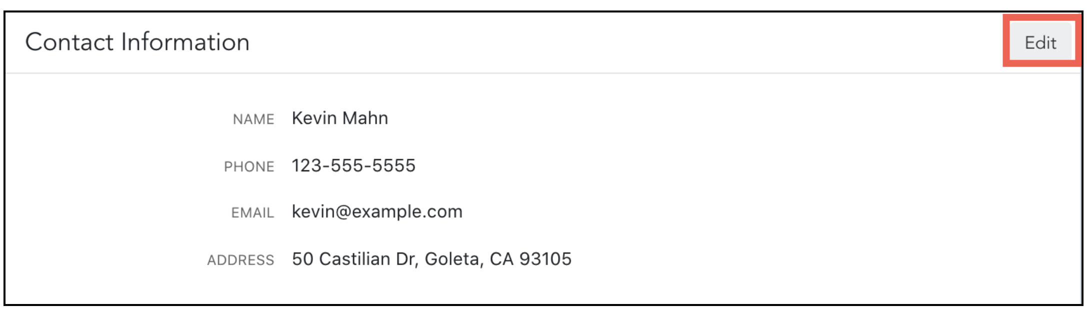
If your investment manager has enabled the ability for you to edit your contact information or Investment Entity information in the Investor Portal, you can use the guides below to learn how to update this information.

How to Add or Edit Your Contact Information

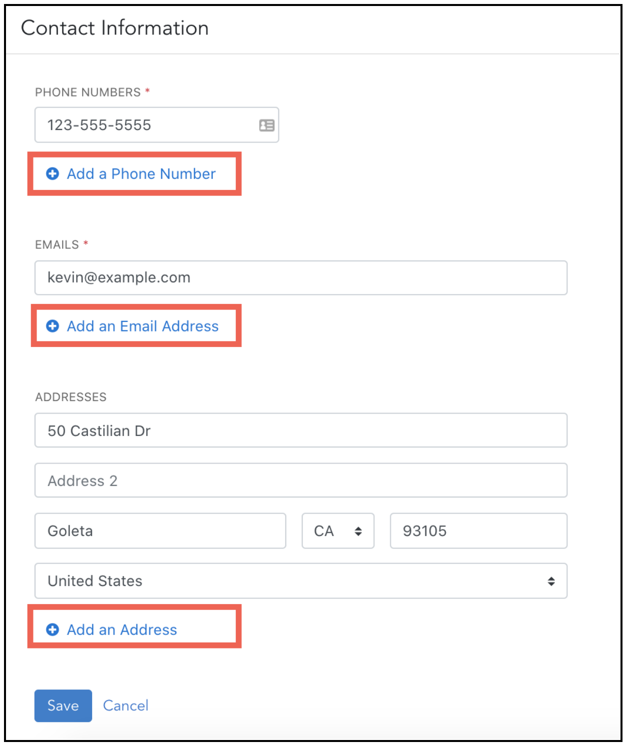
1. Click on your name in the upper right-hand corner of the page and select **My Profile**.



2. Locate the section labeled **Contact Information** and select the **Edit** button in the upper right-hand corner.



3. From here, you can edit your existing contact information, or add additional contact information using the options highlighted below.



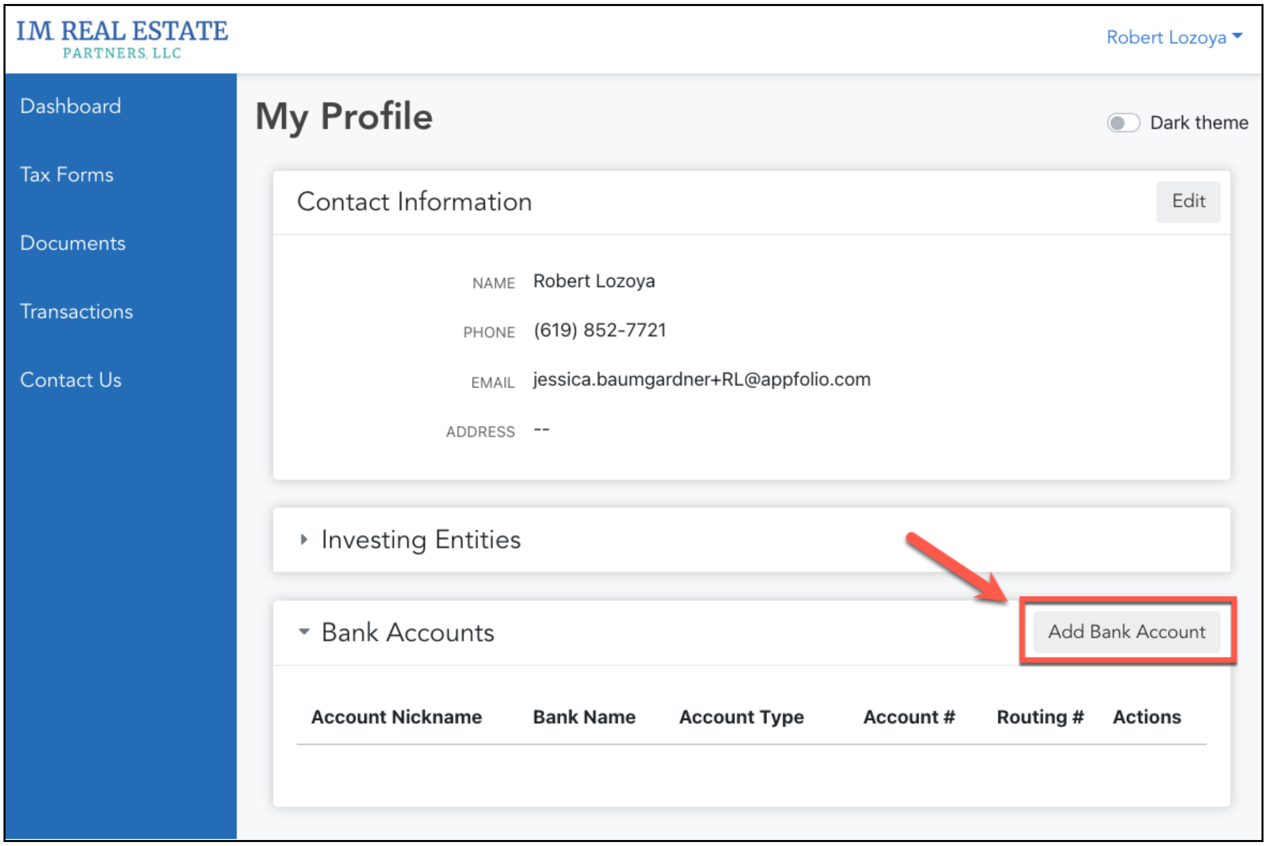
4. Click **Save.**

Add a Bank Account for Payments

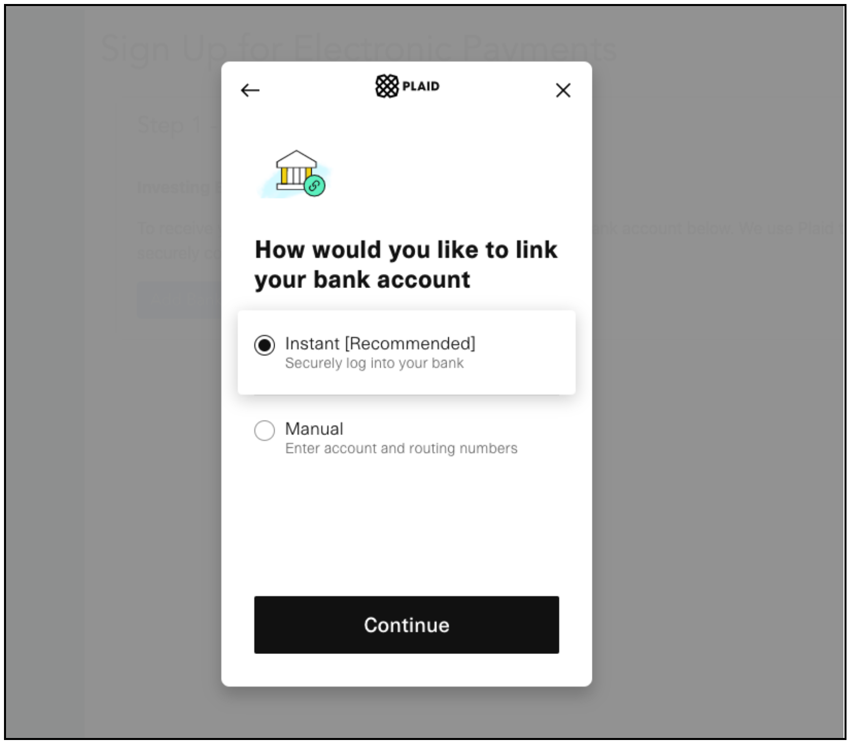
If your investment manager uses electronic payments, you can add your bank account information on the My Profile tab of your Investor Portal. The Investor Portal uses Plaid to securely collect your bank account information, which you can learn more about here.

1. Click on your name in the upper right-hand corner of the page and select **My Profile.**

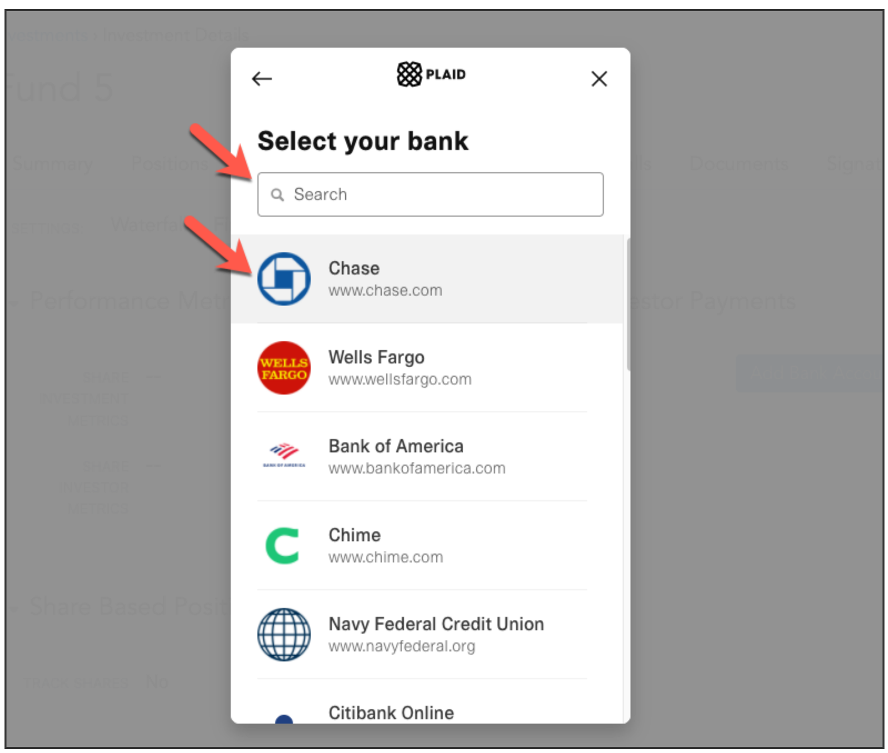
2. In the **Bank Accounts** section, click **Add Bank Account.**



3. Click **Add Bank Account** to open a [Plaid modal] to securely provide your bank information.
4. Select whether to instantly (recommended) or manually link your bank account.



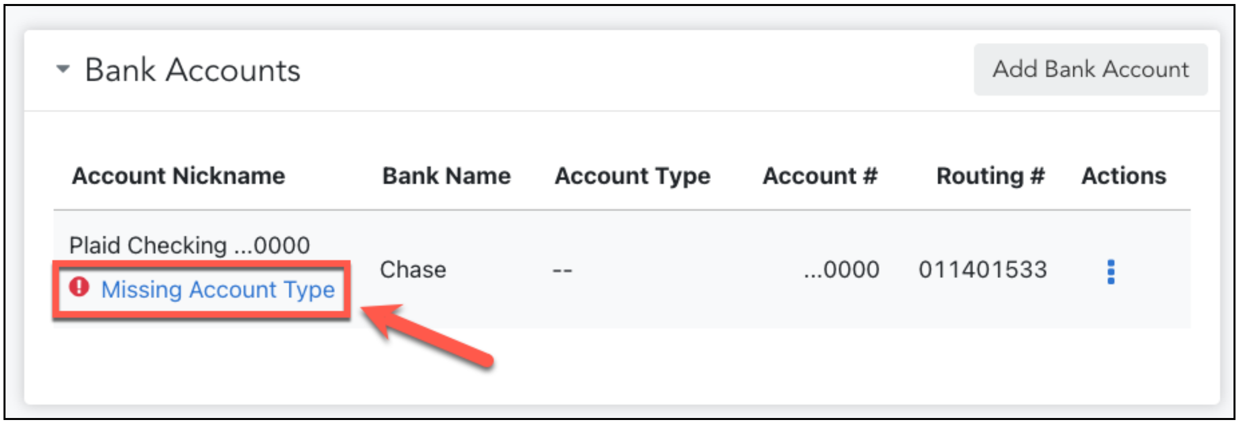
5. Search for and select your bank provider.



6. Enter your **Username** and **Password** and click **Submit.**

7. Select which account distributions should be deposited into and click **Continue.** Your account will begin syncing.

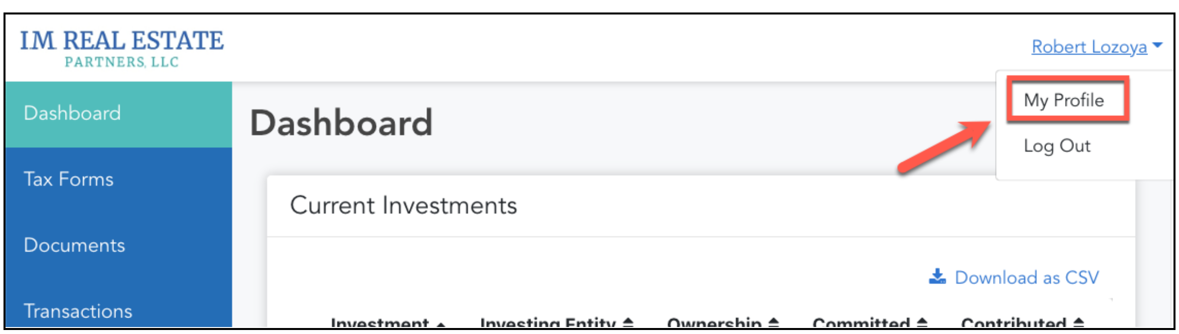
8. Your account will begin syncing. You will be prompted to add any additional information to finish syncing your account.



How to Edit Investing Entity Details

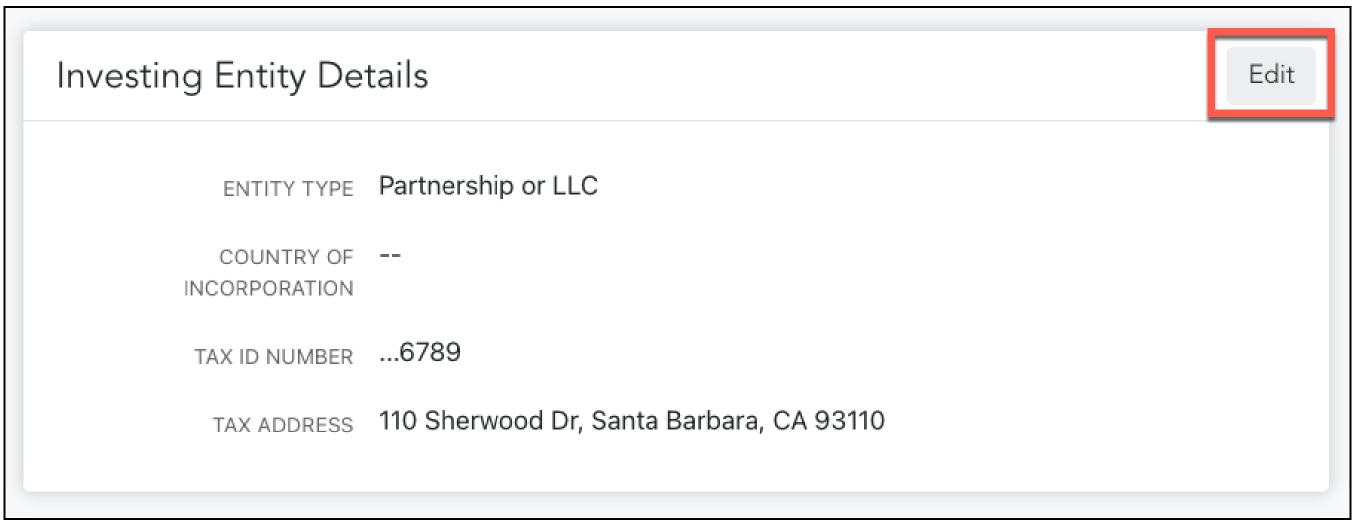
You can update your Investing Entity details, add associated contacts to your investing entity, and update your payment method from the My Profile tab of your Investor Portal. To add a bank account for use, see [Add a Bank Account for Payments](#).

1. Click on your name in the upper right-hand corner of the page and select **My Profile.**



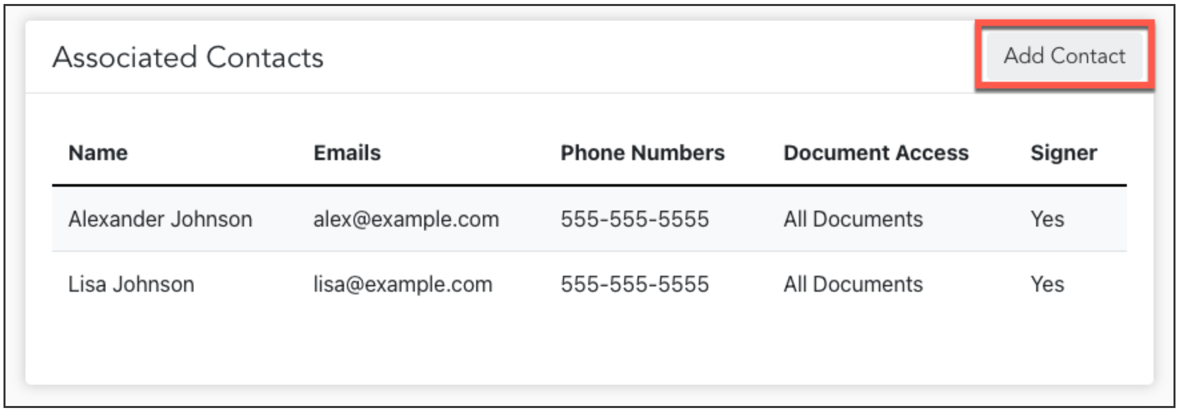
2. From the section labeled **Investing Entities**, find the Investing Entity you would like to edit details for and select **Edit.**

3. To update your tax address, locate the section labeled **Investing Entity Details** and select the **Edit** button in the upper right-hand corner.

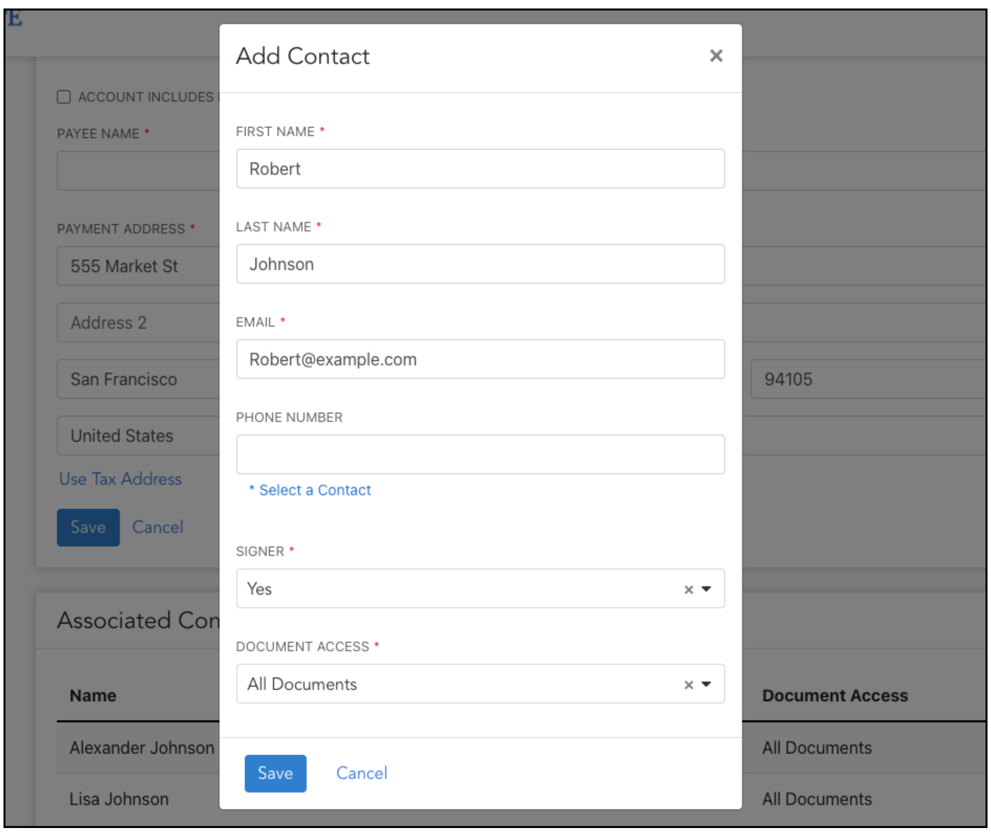


   a. Enter or update your Investing Entity's **Tax Address**. If you need to make changes to your **Tax ID Number** or **Entity Type**, please contact us.

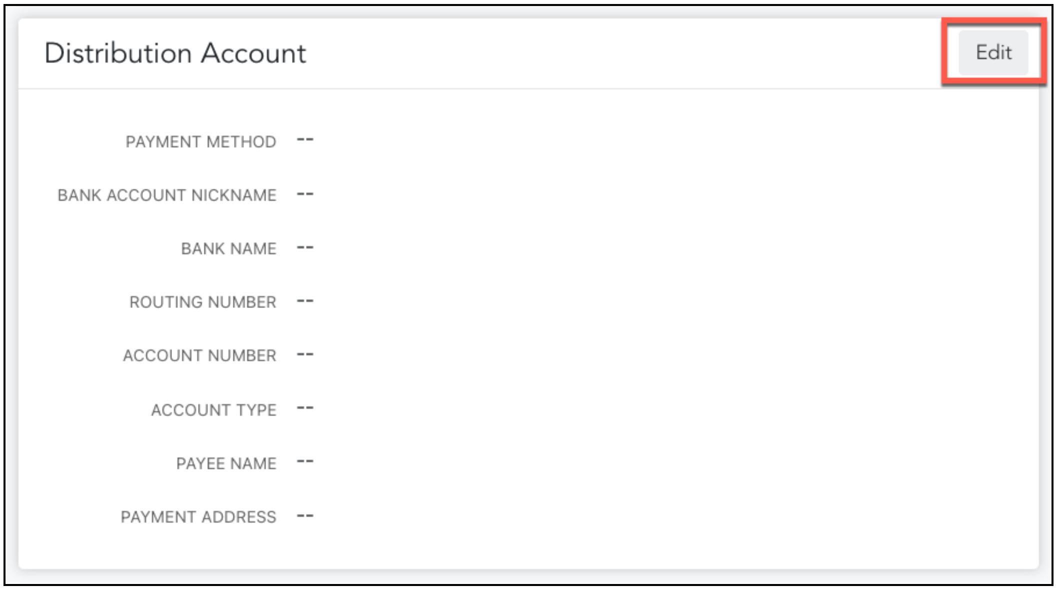
4. To add an additional contact to your investing entity, locate the section labeled Associated Contacts and select the Add Contact button in the upper right-hand corner.



a. Select an associated contact from one of your other Investing Entities or select **Add a New Contact** and enter their contact information. Select whether the contact should be a signer on future documents and which documents they will have access to.



5. To update your payment information, locate the section labeled **Distribution Account** and select the **Edit** button in the upper right-hand corner.

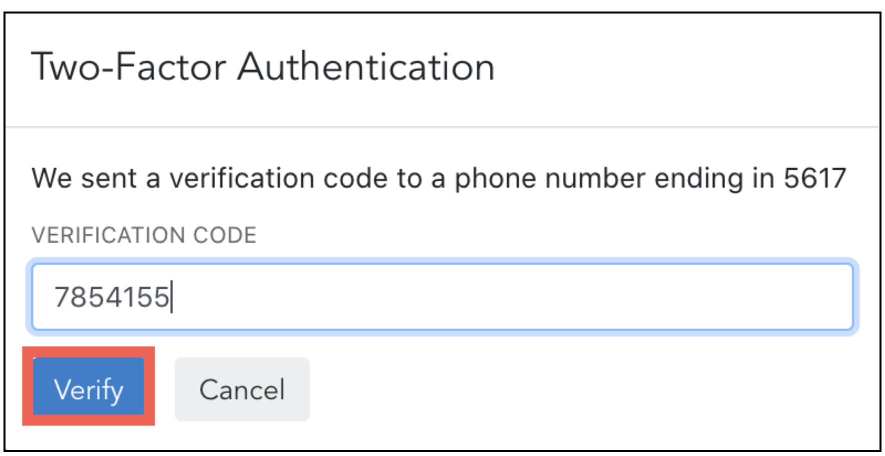


6. Select your Payment Method, a previously linked bank account, a payee name and your entity's Payment Address. If your account information is wrong or no accounts are available, you will need to add a new Bank Account in the portal. See Add a Bank Account for Payments for information.

7. Click **Save.**

8. A confirmation window will appear prompting you to enter a **Verification Code**. A verification code will be sent to your phone via text message, locate the code, enter it into the field, and select **Verify** to confirm and finalize your changes.

   Note: Your account and routing numbers will be censored after verification.



9. Once updated, you will receive an email confirming any changes you have made.

Your Reinvestment Preferences Have Been Updated External Inbox ×

Investment Management Real Estate Partners <noreply@noreply.appfolioim.com>
to kevin.mahn+1

IM REAL ESTATE
PARTNERS, LLC

Hello Frank,

We've received your updated investing entity information. Please review the changes to your details:

CURRENT INFORMATION

575 D Street:

Investing Entity: Beyond Capital LLC

- Reinvest: Yes
- Ownership Percentage: 1.1764%

Need to make a change? Log in to your investor portal to verify your contact information or make additional changes.

Log In to Portal

Thank you,
Investment Management Real Estate Partners
805-555-1234