**Creating a Subscription**

1. Click the blue button *(see below)* provided in the PPM email titled:
   * 1. “Trinity [[Deal Name]] Investors LLC – PPM and Subscription Package”
   1. There are separate links for Preferred Equity and Mezzanine Debt, so make sure you navigate to the correct email.
   2. If you do not have the desired offering email, contact [clientrelations@trinityinvestors.com](mailto:clientrelations@trinityinvestors.com) for a link.

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| --- | --- | --- |
| |  |  | | --- | --- | | [Trinity \_\_\_\_\_\_ Investors LLC - Preferred Equity](https://linkprotect.cudasvc.com/url?a=https%3a%2f%2finvestors.trinitypeg.com%2fportal%2foffering%2f057ec07a-2e2c-491e-99de-7dc1136fcde6&c=E,1,VDkfnyvKit-EOUW9NGXc67qVcdBuXpAnL2Vd5pfyYbtDVAQLVDjEykk9utre2IufTmdBWWVuijVDeNlp8YAHnUteC8KUzbDO7riVaQcs3OKYU2KS775FkPf_O5gy&typo=1) | Trinity\_\_\_\_\_\_ Investors LLC - Mezzanine | |

1. Click “Create my subscription.”
2. Fill out “Investment Amount” and “Subscriber Identity” sections.
   1. **Select the correct entity you intend to invest through (individual, joint, LLC, IRA, Trust, etc.)** *(See Below)*

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* 1. **Make sure “Subscriber’s full legal name” matches the entity you are investing through.**



* + 1. Ex. “James Smith”
    2. Ex. “Madison Trust Company Custodian FBO James Smith IRA #0000000”
    3. Ex. “James Smith Ventures LLC”

1. Fill out bank name and account information.
   1. **If investing through an IRA**, input the Custodian’s routing and account number.
      1. Click “Add additional instructions” and type “FBO [[Your Name IRA #0000000]]”
2. Fill out Accredited Investor / Qualified Purchaser status.
   1. **If none of the statements apply, select the bottom option “I do not currently qualify for Accredited Investor Status”** *(See Below)*

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1. Add any additional contacts to receive communications and specify which types of communications they should receive.
   1. Ex. Tax Advisor, Accountant, Executive Assistant
   2. If you invested in an entity with more than one owner, the other signatories would automatically receive all communications.
2. Review your questionnaire and verify that all information is correct, then click “Sign Electronically” at the bottom.
3. Click “Sign via DocuSign”
   1. You do not need to upload any additional documents to this page.
4. Check your inbox for an email from DocuSign containing your subscription agreement and follow the promptings.
   1. If your agreement has multiple signatories, it will be sent to the next individual’s inbox after the previous signature.
   2. After all parties sign, the agreement will be drawn up by Trinity Investors Staff, and you will receive an email confirmation typically within 24 hours.
5. If you have not already, please submit the [Trinity Client Profile Form](https://tpeg.formstack.com/forms/client_profile_form_05_17_2021) to support your first investment.

Please contact [clientrelations@trinityinvestors.com](mailto:clientrelations@trinityinvestors.com) if you have any questions!