Caruso How To Guide

How do I take up a new offer?

Applying for new investment opportunities

1. Log in to to the Investor Portal.

2. Click the "Invest" tab to explore the available investment opportunities.

(Before you can invest in the fund, you need to make sure you have added your investing entity to your account. See the guide here: <u>https://www.mackersyproperty.co.nz/investor-portal-help/create-a-new-investing-entity</u>).

		_			
//// Mackersy Property	Invest	Portfolio	Documents	Transactions	Add investing entity Image: Add investing entity

3. Open funds will be visible at the top of the page, while fully subscribed funds will appear greyed out, located further down.

4. Click on the open investment offer you would like to see.

By selecting a specific fund, you can access comprehensive information including key metrics and relevant documents to make an informed investment decision.

Please note that these offers are examples only, they are not necessarily open to accept new allocations at this time. Please check the **Invest** tab for up-to-date offers.



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5. Once you are in the offer, you will see the three different ways you can invest in the fund.

Please note: these offers are examples only, they are not necessarily open to accept new allocations at this time. Please check the "**Invest**" tab for up-to-date offers.

//// Mackersy Property	/ Invest Portfolio Documents Transactions	Add investing entity
	Please select 1 of these 3 options before requesting your allocation	Request an allocation
	Option 1: Invest as a Limited Partner CURRENTLY SELECTED Request an allocation on this page to invest directly as a Limited Partner and receive the full gross return from the Partnership. In return as a Limited Partner you take on your share of the tax obligations on behalf of the Partnership's operations.	Min. investment NZD 100,000.00 Price per unit NZD 1,000.00
	Option 2: Invest as a Shareholder in a Limited Liability Company Click the button below to invest as a shareholder of a Limited Liability Company (LLC) that will become a Limited Partner. This option provides you with net returns where the Company pays its own tax and distributes returns after the tax has been paid.	Units on Offer 28,462 Number of units you would like to purchase - 1 Units
	U don't know We will contact you after receiving your allocation request to discuss your options.	Your total investment NZD 1,000.00

6. Select what option you would like to invest as:

- **Option 1:** Invest as a Limited Partner (pre-selected option) You will receive the full gross return from the Partnership and take care of your own tax liabilities
- **Option 2:** Invest as a Shareholder in a Limited Liability Company *This option provides you with net returns and tax paid at source.*
- Option 3: I don't know Mackersy Property will contact you after receiving your allocation request to discuss your options

//// Mackersy Property	Invest Portfolio Documents Transactions		Add investing entity	
Please s	select 1 of these 3 options before requesting your allocation	∧ Rec	quest an allocation	
Required for the second s	ion 1: Invest as a Limited Partner CURRENTLY SELECTED uest an allocation on this page to invest directly as a Limited Partner and receive the full s return from the Partnership. In return as a Limited Partner you take on your share of the pations on behalf of the Partnership's operations.		t NZD 100,000.00 NZD 1,000.00	
Click	ion 2: Invest as a Shareholder in a Limited Liability Company the button below to invest as a shareholder of a Limited Liability Company (LLC) that wome a Limited Partner. This option provides you with net returns where the Company pay tax and distributes returns after the tax has been paid.		28,462 s you would like to purchase 1 Units +	
	n't know vill contact you after receiving your allocation request to discuss your options.		stment NZD 1,000.00 nd this is an investment ty for wholesale investors, and that	
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How do I take up a new offer?

Option 1 - Invest as a Limited Partner

1. Go to the far side of the page to the "Request an allocation" box, and select how many units you would like to purchase.

- 2. Tick the box to accept that you understand this offer is for Wholesale investors only.
- 3. Click "Submit allocation request" to complete. The box will only appear black when you complete step 1. and 2. above.

After submitting your allocation request through the Investor Portal, the Investor Relations team will promptly review it. They may either confirm, make adjustments, or decline the request, providing a reason.

Look out for an email that will guide you through the next steps, including payment processing instructions for your allocated amount.

Please select 1 of these 3 options before reques	ting your allocation	Request an allocation
Option 1: Invest as a Limited Partner CURRENT	Min. ir	ivestment NZD 100,000.0
Request an allocation on this page to invest directly as gross return from the Partnership. In return as a Limite obligations on behalf of the Partnership's operations.	Partner you take on your share of the tax	per unit NZD 1,000.0
Option 2: Invest as a Shareholder in a Limited		on Offer 28,46
Click the button below to invest as a shareholder of a become a Limited Partner. This option provides you wi own tax and distributes returns after the tax has been	th net returns where the Company pays its	er of units you would like to purchase 100 Units +
U don't know We will contact you after receiving your allocation requ	est to discuss your options.	otal investment NZD 100,000.0 understand this is an investment opportunity for wholesale investors, and the
OPEN SINGLE-ASSET WHOLESALE	c	will be required to complete wholesale sertification before my allocation request is locepted.

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How do I take up a new offer?

Option 2 - Invest as a shareholder in a limited liability company

1. When you are in the offer, select "Option 2: Invest as a Shareholder".

View the offer and available documents, then if you wish to invest as a shareholder, follow the "**Request an allocation**" steps as stated in *Option 1*.

Please select 1 of	these 3 options before requesting your allocation	Request an allocation
Request an alloc gross return from	st as a Limited Partner ation on this page to invest directly as a Limited Partner and receive the n the Partnership. In return as a Limited Partner you take on your share of shalf of the Partnership's operations.	
CURRENTLY SELEC Click the button become a Limite	TED below to invest as a shareholder of a Limited Liability Company (LLC) that d Partner. This option provides you with net returns where the Company ibutes returns after the tax has been paid.	100 01110
U don't know	ou after receiving your allocation request to discuss your options.	I understand this is an investment opportunity for wholesale investors, and th I will be required to complete wholesale
	NHOLESALE	certification before my allocation request i accepted.

Option 3 - I don't know

1. If you are unsure what option to invest as, select "Option 3: I don't know".

Follow the "**Request an allocation**" steps as stated in *Option 1*. The Mackersy Property team will contact you after receiving your allocation request to discuss your options.

//// Mackersy Property	Invest Portfolio Documents Transactions	Add investing entity
РІ	Please select 1 of these 3 options before requesting your allocation	Request an allocation
	Option 1: Invest as a Limited Partner Request an allocation on this page to invest directly as a Limited Partner and receive the full gross return from the Partnership. In return as a Limited Partner you take on your share of the tax obligations on behalf of the Partnership's operations.	Min. investment NZD 100,000.00 Price per unit NZD 1,000.00
	Option 2: Invest as a Shareholder in a Limited Liability Company Click the button below to Invest as a shareholder of a Limited Liability Company (LLC) that will become a Limited Partner. This option provides you with net returns where the Company pays its own tax and distributes returns after the tax has been paid.	Units on Offer 28,462 Number of units you would like to purchase - 100 Units +
	V I don't know CURRENTLY SELECTED We will contact you after receiving your allocation request to discuss your options.	Your total investment NZD 100,000.00
OPEN	N SINGLE-ASSET WHOLESALE	I will be required to complete wholesale certification before my allocation request is accepted.
Ma	ackersy Drury Limited Partnership	Submit allocation request