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>).

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//// Mackersy Property	Invest	Portfolio	Documents	Transactions	Add investing entity Image: Add investing entity
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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 Propert	ty Invest Portfolio Documents Transactions	Add investing entity Image: Contract of the second secon
	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	Min. investment NZD 100,000.00
	obligations on behalf of the Partnership's operations. 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	Units on Offer 28,462
	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.	- 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 select 1 of these 3 options before requesting your allocation	Request an allocation
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
Click the button below to 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 +
don't know We will contact you after receiving your allocation request to discuss your options.	Your total investment NZD 1,000.00 I understand this is an investment opportunity for wholesale investors, and that
OPEN SINGLE-ASSET WHOLESALE Mackersy Drury Limited Partnership	I will be required to complete wholesale certification before my allocation request is accepted.

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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 o	f these 3 options before requesting you	r allocation	Request an a	allocation
Option 1: Inv Request an allo gross return fro obligations on b	est as a Limited Partner CURRENTLY SELECTE cation on this page to invest directly as a Limited or the Partnership. In return as a Limited Partner behalf of the Partnership's operations.	Partner and receive the full you take on your share of the tax	Min. investment Price per unit	NZD 100,000.00
Option 2: Inv Click the buttor become a Limit own tax and dis	vest as a Shareholder in a Limited Liabilit n below to invest as a shareholder of a Limited Lia ted Partner. This option provides you with net retu stributes returns after the tax has been paid.	y Company ability Company (LLC) that will urns where the Company pays its	Units on Offer Number of units you would – 100 U	28,462
I don't know We will contact	you after receiving your allocation request to dis	cuss your options.	Your total investment understand this is an opportunity for whole	NZD 100,000.00 investment sale investors, and that
OPEN SINGLE-ASSET	WHOLESALE		I will be required to oc certification before my accepted.	mplete wholesale y allocation request is
Mackers	y Drury Limited Pa	rtnership	Submit alla anti	

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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
Option 1: Ir Request an a gross return obligations o	nvest as a Limited Partner llocation on this page to invest directly as a Limited Partner and receive the full from the Partnership. In return as a Limited Partner you take on your share of the ta n behalf of the Partnership's operations.	Min. investment NZD 100,000.00 Price per unit NZD 1,000.00
CURRENTLY SU CURRENTLY SU Click the but become a Lir own tax and	INVEST as a Shareholder in a Limited Liability Company ELECTED ton below to invest as a shareholder of a Limited Liability Company (LLC) that will nited Partner. This option provides you with net returns where the Company pays it distributes returns after the tax has been paid.	Units on Offer 28,46 Number of units you would like to purchase - 100 Units + Your total investment NZD 100,000,01
U don't kno We will conta	W ct you after receiving your allocation request to discuss your options.	I understand this is an investment opportunity for wholesale investors, and that I will be required to complete wholesale
		I will be required to complete wholesale certification before my allocation request is 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.

Option 1: In Request an a gross return obligations c Option 2: I	vest as a Limited Partner location on this page to invest directly as a Limited Partner and receive th rom the Partnership. In return as a Limited Partner you take on your share a behalf of the Partnership's operations.	e full Min. investment	NZD 100,000.00
Option 2: I			NZD 1,000.00
Click the but become a Li own tax and	nvest as a Shareholder in a Limited Liability Company on below to invest as a shareholder of a Limited Liability Company (LLC) t nited Partner. This option provides you with net returns where the Compan listributes returns after the tax has been paid.	Units on Offer hat will y pays its	28,462 ould like to purchase DO Units +
Ve will conta	CURRENTLY SELECTED tyou after receiving your allocation request to discuss your options.	Your total investment	NZD 100,000.00 s an investment nolesale investors, and that