

### Individual or Joint Investment

An investor must be of legal age for the state in which he/she resides in order to be listed as an Individual or Joint Owner of an account.

Owner (First, Middle Initial, Last)

Date of Birth (mm/dd/yyyy)

Social Security Number (xxx-xx-xxxx)

Joint Owner (First, Middle Initial, Last)

Date of Birth (mm/dd/yyyy)

Social Security Number (xxx-xx-xxxx)

### Address

Please provide the requested information for the primary registrant only. This information is used as the address of record for correspondence.

Address

City

State

Zip Code

Home Phone Number

Work Phone Number

Email Address

Please indicate if we may list you as a financial supporter in our annual report:

☐ Yes, please list my/our name(s) in the annual report.

☐ No, please do not list my/our name(s) in the annual report.

Please indicate how you would like to receive your financial audits (choose one):

☒ Physically by mail

☐ Electronically by e-mail

Email Address

## Investor Information

The minimum investment is \$1,000 and the minimum term is 5 years. Interest payment dates are made April 30 and October 30. Investors have the option to reinvest their interest payments with Finanta. Interest will be reinvested into principal, on those dates.

\$ <input type="text"/>	<input type="text"/>
Principal Amount	Term (in years)

Interest: ☐ Reinvest Interest  
☐ Pay Interest Semi-Annually

Please include all checks made payable to Finanta.

## Bequest

Investors may choose to donate the principal of their loan, along with all accrued and unpaid interest, to Finanta in the event of their death(s) prior to the maturity date of the loan. Funds will be retained as equity in the Finanta Loan Fund to be used for the same purposes as the initial investment. In the case of joint investors, the donation will be deemed to be made at the death of the last survivor of the Investors. Because this may impact an Investor's estate and tax plan, we suggest that Investors who make this election discuss this with their estate and tax planning advisors. The Promissory Note will set forth the terms and conditions of the donation.

### Individual Investor

- ☐ I wish to donate the then outstanding principal amount of my loan, along with all accrued and unpaid interest, to Finanta as a contribution to equity in the Loan Fund in the event of my death before the maturity date.

### Joint Investor

- ☐ We wish to donate the then outstanding principal amount of our loan, along with all accrued and unpaid interest, to Finanta as a contribution to equity in the Loan Fund in the event of the death of the second or last of us before the maturity date.

I certify that to best of my knowledge that the information provided above is correct. I have also received and read the Prospectus for the Fund in which I am investing and I agree to the terms of the Prospectus.

Owner

Joint Owner

Date

Date

How did you hear about Finanta?

With investments from people like you, we can continue to transform communities, advance opportunity and create prosperity for low-income people and communities. **Thank you for your investment.**

# finanta