

CITApp Form Fields Guide

Contents

I	Understanding Field Requirements	iii
II	Form Field Specifications	iv
I	CIT Corporation	1
I	Sponsor Organization	1
II	Investor	1
III	Beneficiary	2
IV	Proxy	2
V	Other	3
III	Field Categories	4
I	Contact Information Fields	4
II	Legal Information Fields	4
III	Financial Information Fields	4
IV	Data Entry Tips	5
I	Required Field Validation	5
II	Address Fields	5
III	Percentage Fields	5

This section documents all form fields across the CITApp platform, organized by entity type. Each field is marked as either **Required** or **Optional**.

I

Understanding Field Requirements

- Reference to Required item Required Field must be completed to save the form
- Optional Field can be left blank

II

Form Field Specifications

I CIT Corporation

I.1 CIT Corporation Info

1 required, 4 optional fields

Field	Required	Notes
CIT Corporation Name	Required	
Website	Optional	
Billing Email	Optional	
Company Email	Optional	
Phone Number	Optional	

I.2 CIT Corporation Addresses

1 required, 2 optional fields

Field	Required	Notes
Primary Address	Required	
Mailing Address	Optional	
Logo	Optional	

I.3 CIT Corporation Legal

1 required, 5 optional fields

Field	Required	Notes
Legal Name	Required	
EIN	Optional	
State of Incorporation	Optional	
State of Operating	Optional	
Date Formed	Optional	
State Filing Number	Optional	

I.4 CIT Corporation Contacts

0 required, 4 optional fields

Field	Required	Notes
Address	Optional	
Company Contact	Optional	
Accounting Contact	Optional	
Legal Contact	Optional	

I Sponsor Organization

I.1 Sponsor Organization Info

1 required, 4 optional fields

Field	Required	Notes
Sponsorship Organization Name	Required	
Website	Optional	
Billing Email	Optional	
Company Email	Optional	
Phone Number	Optional	

I.2 Sponsor Organization Addresses

1 required, 2 optional fields

Field	Required	Notes
Primary Address	Required	
Mailing Address	Optional	
Logo	Optional	

II Investor

II.1 Investor Info Sections

2 required, 1 optional fields

Field	Required	Notes
Investor Info	Required	
Primary Address	Required	
Mailing Address	Optional	

III Beneficiary

III.1 Beneficiary Form

4 required, 2 optional fields

Field	Required	Notes
First Name	Required	
Last Name	Required	
Email	Required	
Phone	Optional	
Beneficiary Percentage	Required	
Address information	Optional	

IV Proxy

IV.1 Proxy Info Details

0 required, 9 optional fields

Field	Required	Notes
Proxy ID	Optional	
Title	Optional	
Quorum	Optional	
Record Date	Optional	
Mailing Date	Optional	
Meeting Date & Time	Optional	
Voting Close Date & Time	Optional	
Completed Date	Optional	
Description	Optional	

IV.2 Proxy Info Metrics

0 required, 8 optional fields

Field	Required	Notes
Status	Optional	
CIT Corporation	Optional	
Total Shares	Optional	
Total Voted Shares	Optional	
Total Unvoted Shares	Optional	
Number Of Shareholders	Optional	
Number Of Voted Shareholders	Optional	
Number Of Unvoted Shareholders	Optional	

V Other

V.1 Not Voted Shareholder Card

0 required, 3 optional fields

Field	Required	Notes
Investor Name	Optional	
Email	Optional	
Account ID	Optional	

III

Field Categories

I Contact Information Fields

Contact fields collect communication details:

- **Email** Electronic mail address
- **Phone** Telephone number
- **Address** Physical mailing address

II Legal Information Fields

Legal fields collect regulatory and compliance data:

- **Legal Name** Registered legal entity name
- **EIN** Employer Identification Number
- **State of Incorporation** Jurisdiction of incorporation

III Financial Information Fields

Financial fields collect monetary and accounting data:

- **Amount** Dollar value
- **Billing Email** Email for invoices
- **Bank Information** Payment details

IV

Data Entry Tips

I Required Field Validation

Forms will not save until all required fields are completed. Required fields are typically marked with an asterisk (*) in the user interface.

II Address Fields

Address information may include:

- Street address (line 1 and line 2)
- City
- State/Province
- ZIP/Postal code
- Country

III Percentage Fields

Fields like “Beneficiary Percentage” must total 100% across all entries.