

CIT Investor Manual

Investor's Manual

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Welcome to the documentation for the **Investor** version of the **CIT App**. See below to get started.

Important Notice

The information in this document is for informational purposes only and is not intended to be legal, financial, or other advice. No legal or business decision should be based on its content.

I

Dashboard

The **Investor Portal** will always open up to the *Dashboard*.

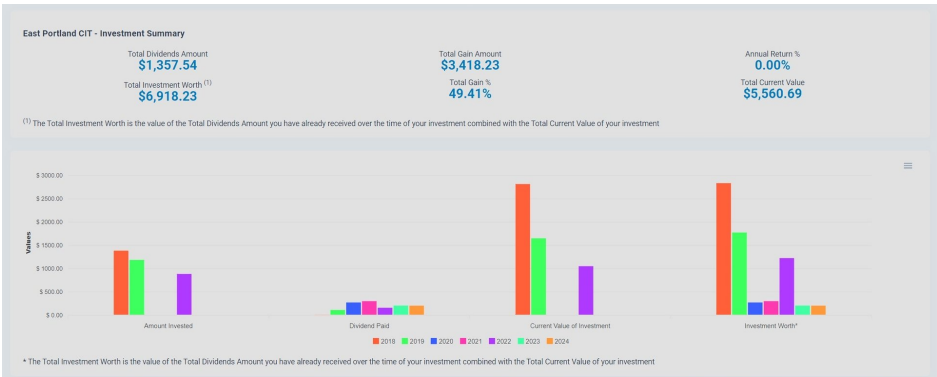


Fig. 1: Investor Portal, Dashboard Screen, Homepage

The main feature of the Dashboard is that it provides an overview of your investment portfolio, including current holdings, recent dividends, and account activity.

Note

You can navigate to the rest of the portal through the **Primary Sidebar**.

II

Investor Portal Sections

The following **Sections** are included in the **Investor Portal** :

- [My Accounts](#) Manage different accounts
- [Dashboard](#) View your portfolio overview
- [Investor Information](#) Manage your personal details
- [Holdings](#) View your investment holdings
- [Dividends](#) Track dividend payments
- [Messages](#) View communications
- [Assessment Test](#) Complete required assessments
- [Change Requests](#) Submit account changes
- [Cashout](#) Request cashouts
- [Proxy](#) Manage proxy voting

III

Table of Contents

I My Accounts

I.1 Managing Different Accounts

Managing accounts allows you to quickly navigate between the homepages of different accounts.

To **Manage an Account**:

1. Go to the **My Accounts** page.

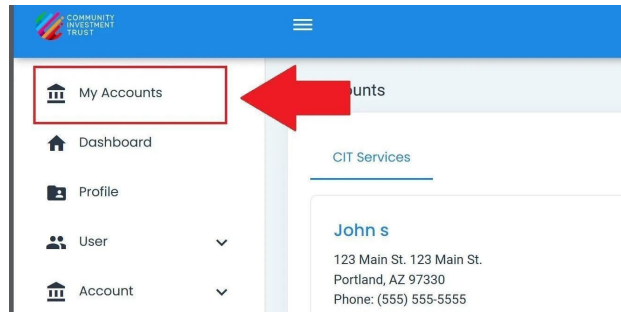


Fig. 2: My Accounts Page Location

2. Find the account you want to manage.
3. Select next to the account name.

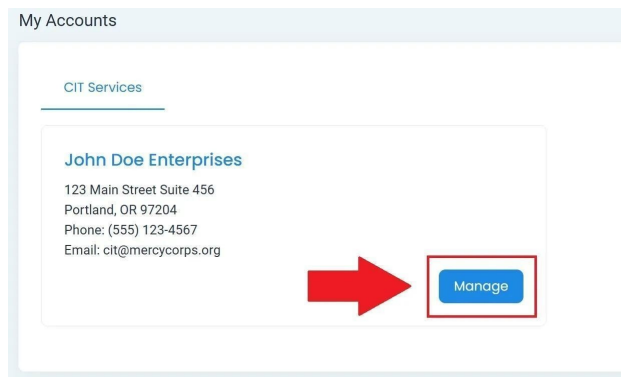


Fig. 3: Manage Button Location

4. Ensure that the *Account Being Managed* matches the account that you selected.

Identifying the Current Account

Identify the current account you are using by looking for the account name next to your profile picture.

The account name is the name surrounded by parentheses

Account Name Example

I.e., **Reference to (item ({current account being managed} Reference to) item)**.

It is:

- to the *right* of your login name.
- to the *left* of your profile picture.



Fig. 4: Account Being Managed Location

I Dashboard

Welcome to the **Dashboard** section. This area displays all companies you have enrolled with as an investor and allows you to manage your investment status.

I.1 Dashboard Tiles

Hover Over or Click a Tile to Explore Further

The tiles below offer quick access to dashboard actions. Hover over or click a tile to explore further.

Dashboard Tiles: Below is a list of the main tiles and their descriptions (in PDF format):

- **Enrollment Status:** Shows your enrollment status and quick actions for a company.
- **Company Options:** Provides access to companyspecific options such as reenrollment.

I.2 Dashboard Homepage

The **Dashboard** section opens to display your enrolled companies:



Fig. 5: Investor Portal, Dashboard, Homepage

Dashboard Sections

The **Dashboard** contains several key areas:

- [Summary Section](#)
- [Investment Summary Graph](#)
- [Notifications](#)

Section Features

For more information on navigating the dashboard:

- View enrolled companies at a glance
- Access quick actions for each company
- Monitor investment summaries
- Check notifications for pending items

Summary Section

You can find the summary section displaying key investment metrics:

Investment Summary Graph

Where to Find It

You can find the **Investment Summary Graph** on the **Dashboard** summary area.

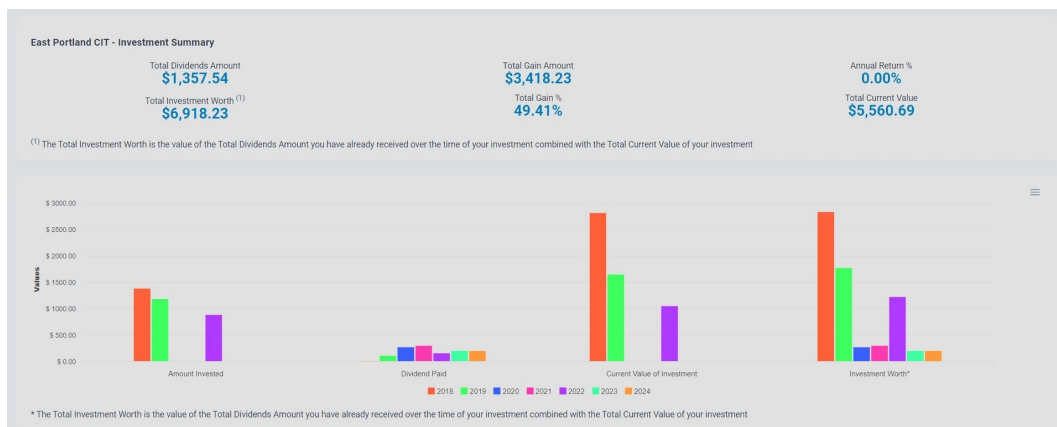


Fig. 6: Investor Portal, Dashboard, Summary Section

Graph Location

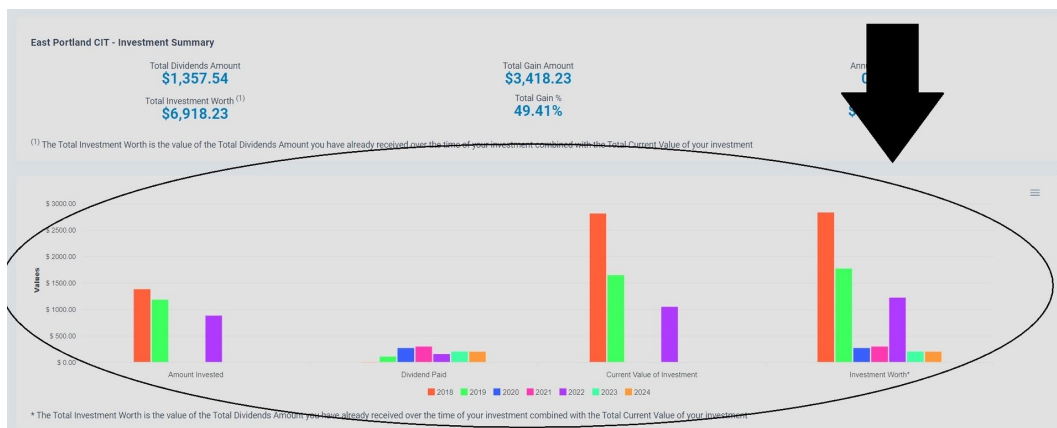


Fig. 7: Investor Portal, Dashboard, Investment Summary Graph Location

Graph Categories Highlighted

Corporation Name Highlighted

Notifications

You can find the notifications at the bottom of the **Dashboard** section:

These notifications summarize pending items that may need your attention, such as:

- Cashout submissions
- New enrollments
- Actions you can take (Continue or Cancel)

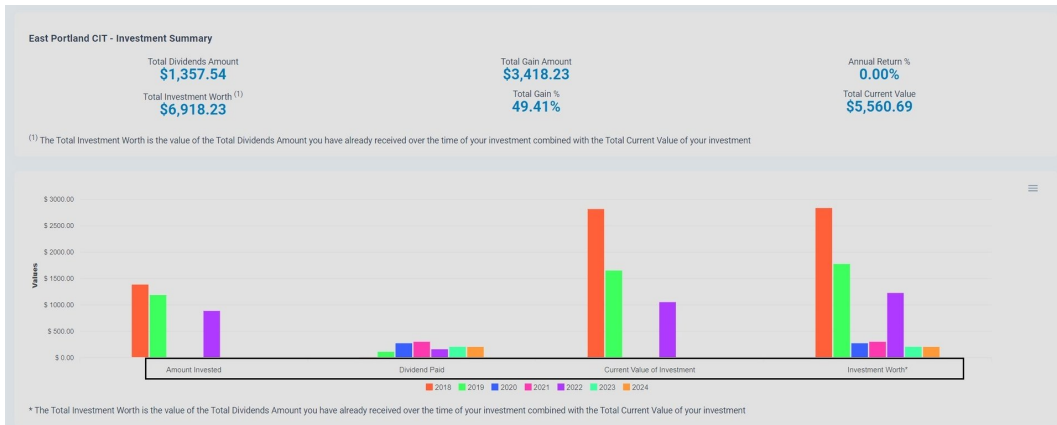


Fig. 8: Investor Portal, Dashboard, Graph Categories Highlighted

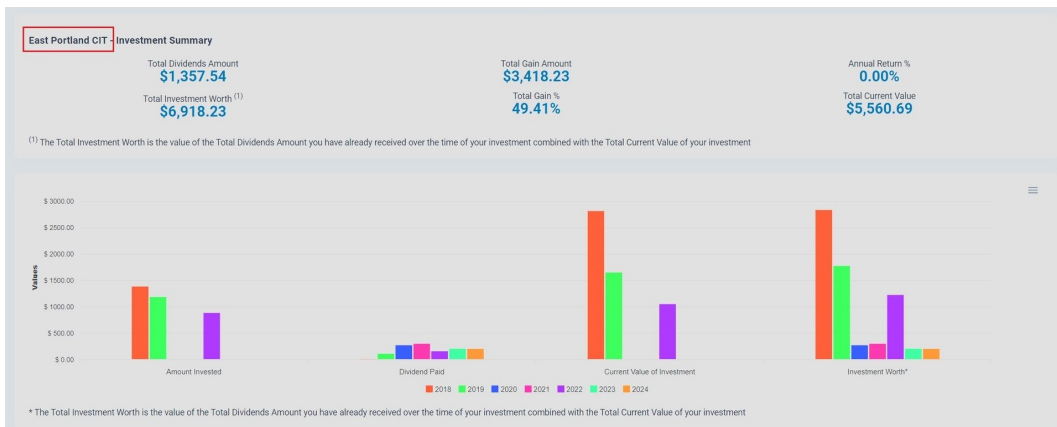


Fig. 9: Investor Portal, Dashboard, Corporation Name Highlighted on Graph

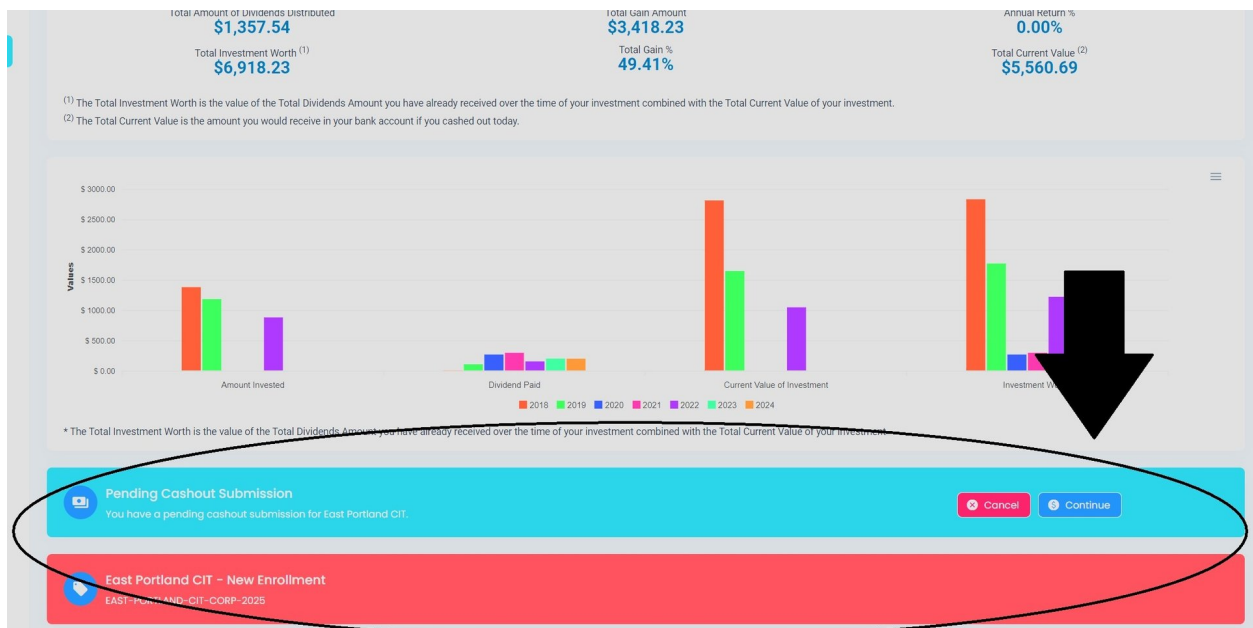


Fig. 10: Investor Portal, Dashboard, Notifications at Bottom

I.3 Dashboard Navigation

Use the sidebar menu to access other investor features. Common destinations from Dashboard:

- [Holdings](#) View your shares
- [Dividends](#) Check payments
- [Messages](#) Read updates
- [Cashout](#) Request withdrawals

Best Practices

Managing Enrollments

1. Review enrolled companies regularly
2. Stop investing if financial circumstances change
3. Keep shares for continued dividend income
4. Reenroll when ready to resume

Record Keeping

1. Export transaction data monthly
2. Screenshot important confirmations
3. Save enrollment change records
4. Document investment decisions

Hover for Page Preview

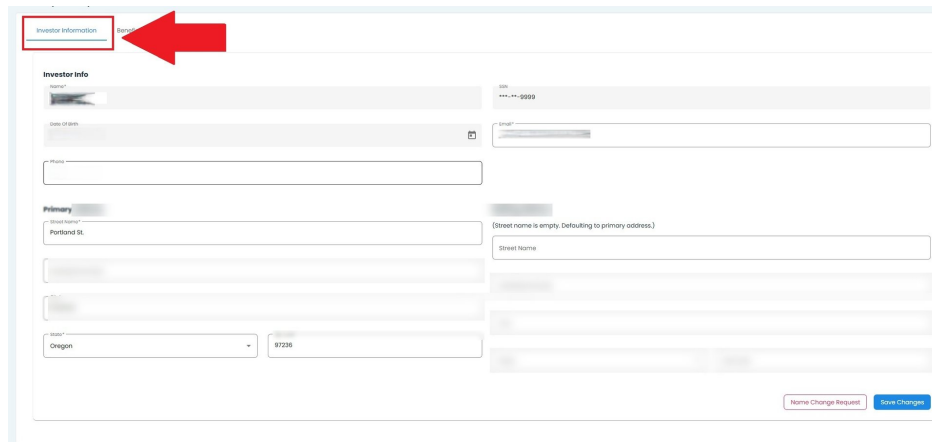
Hover over the links for a page preview.

II Investor

The **Investor Information** section allows you to view your investor profile and manage beneficiary designations.

II.1 Investor Information Tab

The **Information** tab displays your investor profile:



The screenshot shows the 'Investor Information' tab selected in the top navigation bar, indicated by a red arrow. The form is titled 'Investor Info' and contains the following fields:

- Personal Information:**
 - Name: [Redacted]
 - DOB: [Redacted]
 - SSN: [Redacted]
 - Email: [Redacted]
 - Phone: [Redacted]
- Primary Address:**
 - Street Name: [Redacted]
 - City: [Redacted]
 - State: [Redacted]
 - Zip: [Redacted]

At the bottom right, there are two buttons: 'Name Change Request' and 'Save Changes'.

Fig. 11: Investor Portal, Investor Information Tab

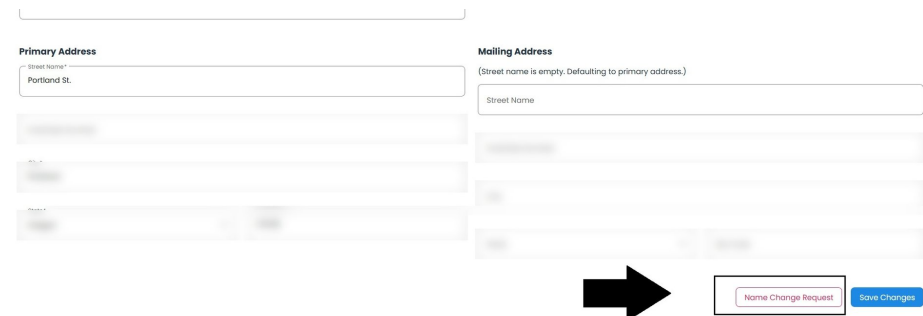
II.2 Available Tabs

The Investor Information section contains:

- **Information** Personal and account details
- **Beneficiaries** Beneficiary designations

II.3 How to Request Name Changes

To update your name on the account:



The screenshot displays the 'Primary Address' and 'Mailing Address' sections of the Investor Portal. The 'Primary Address' section has a 'Street Name' field containing 'Portland St.'. The 'Mailing Address' section has a 'Street Name' field with the placeholder text '(Street name is empty. Defaulting to primary address.)'. A large black arrow points from the address fields to a 'Name Change Request' button, which is located next to a 'Save Changes' button.

Fig. 12: Investor Portal, Name Change Request Button Location

Click the name change request button to initiate a formal change request.

Note

Name changes require administrator approval and supporting documentation.

See Also

- [Beneficiary Designations](#) Manage beneficiaries

Beneficiary Designations

The **Beneficiaries** tab allows you to manage beneficiary designations for your investment accounts.

Beneficiaries Tab Location

Access the Beneficiaries tab from Investor Information:

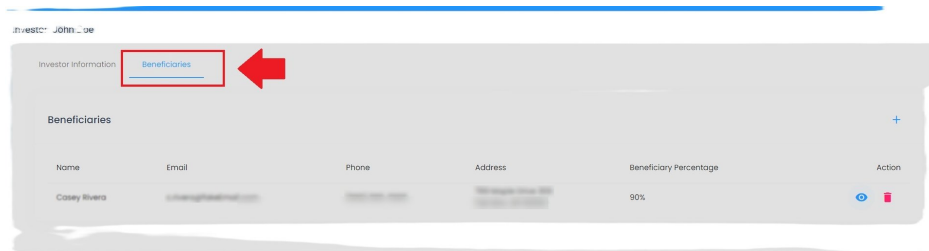


Fig. 13: Investor Information, Beneficiaries Tab Location

Empty Beneficiaries State

When no beneficiaries are designated:

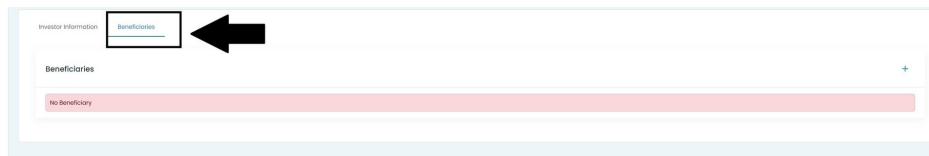


Fig. 14: Investor Information, No Beneficiaries Message

Beneficiaries Table

The **Beneficiaries List** table displays all beneficiary designations for your investment accounts.

Columns: Beneficiaries List Table

The **Columns** for the **Beneficiaries List** table can be found at the top of the table:

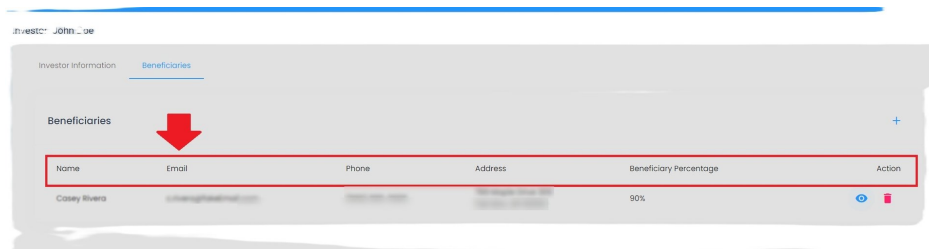


Fig. 15: Investor Information, Beneficiaries Table Column Headers

The **Beneficiaries List** table includes the following columns:

- **Name** Beneficiary's full name

- **Relationship** Relationship to investor
- **Percentage** Allocation percentage
- **Type** Primary or contingent
- **Contact Info** Phone and email
- **Actions** Available actions

How to Add a Beneficiary

Click the **Add Beneficiary** button:

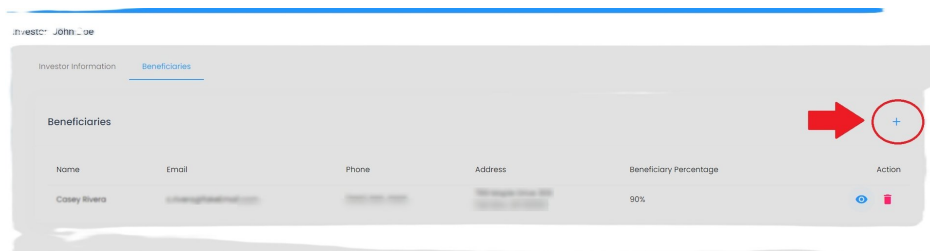


Fig. 16: Investor Information, Add Beneficiary Button

How to View Beneficiary Details

Step 1: Locate View Action

Find the **View** button in the Actions column:

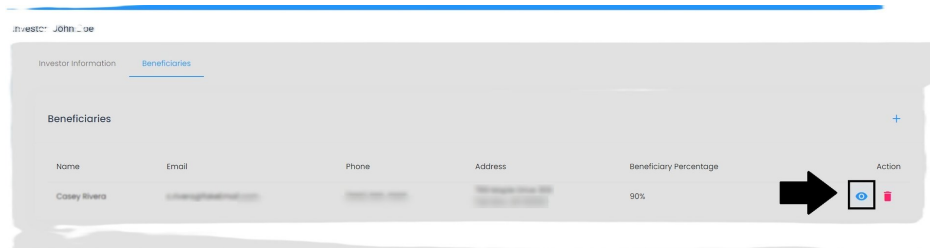


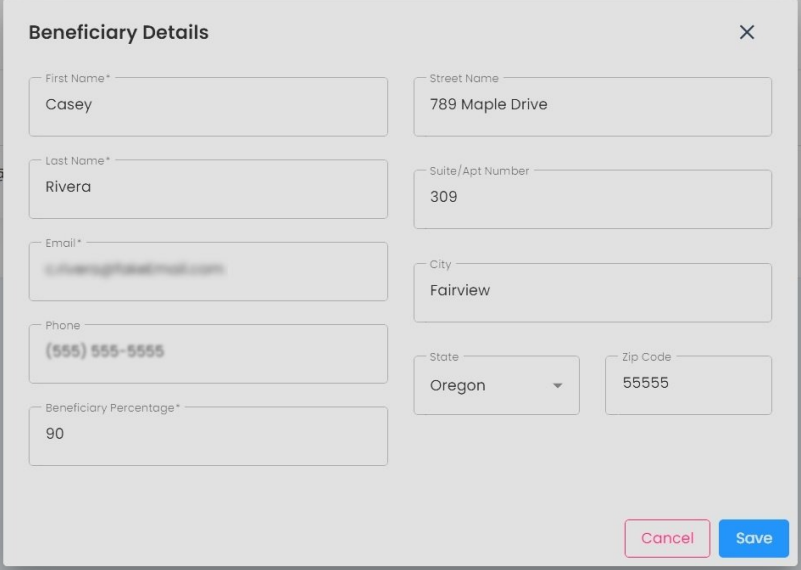
Fig. 17: Investor Information, View Beneficiary Details Action

Step 2: Review Details Popup

View complete beneficiary information:

How to Delete a Beneficiary

Click the **Delete** button to remove a beneficiary:

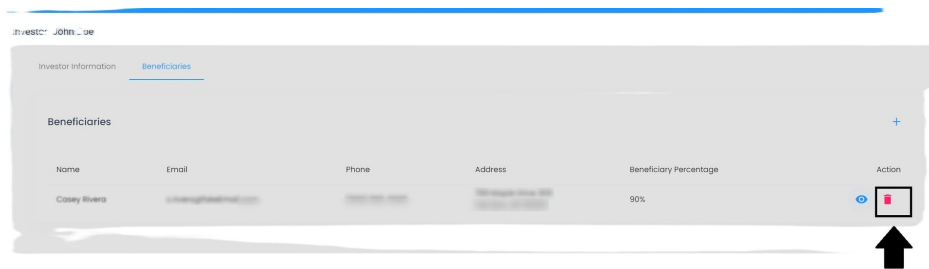


A modal form titled "Beneficiary Details" with a close button (X) in the top right corner. The form contains several input fields for beneficiary information:

- First Name*: Casey
- Last Name*: Rivera
- Email*: c.rivera@citinvestor.com
- Phone*: (555) 555-5555
- Beneficiary Percentage*: 90
- Street Name: 789 Maple Drive
- Suite/Apt Number: 309
- City: Fairview
- State: Oregon (dropdown menu)
- Zip Code: 55555

At the bottom right of the form are two buttons: "Cancel" (pink) and "Save" (blue).

Fig. 18: Investor Information, Beneficiary Details Popup



The screenshot shows the "Investor Information" page with the "Beneficiaries" tab selected. A table lists the beneficiary information, and a red square icon with a white trash can symbol is highlighted in the "Action" column for the first beneficiary, with a black arrow pointing to it from below.


Name	Email	Phone	Address	Beneficiary Percentage	Action
Casey Rivera	c.rivera@citinvestor.com	(555) 555-5555	789 Maple Drive, Suite 309, Fairview, OR 55555	90%	

Fig. 19: Investor Information, Delete Beneficiary Action

Warning

Deleting a beneficiary removes them permanently. Ensure remaining beneficiary percentages total 100% after deletion.

Important Considerations

Important

- Primary beneficiaries must total 100%
- Contingent beneficiaries must total 100% (if designated)
- Update beneficiaries after major life events
- Keep beneficiary contact information current

III Document

The **Document** section provides access to your financial documents and signed offering agreements.

Location

Investor Portal > Document

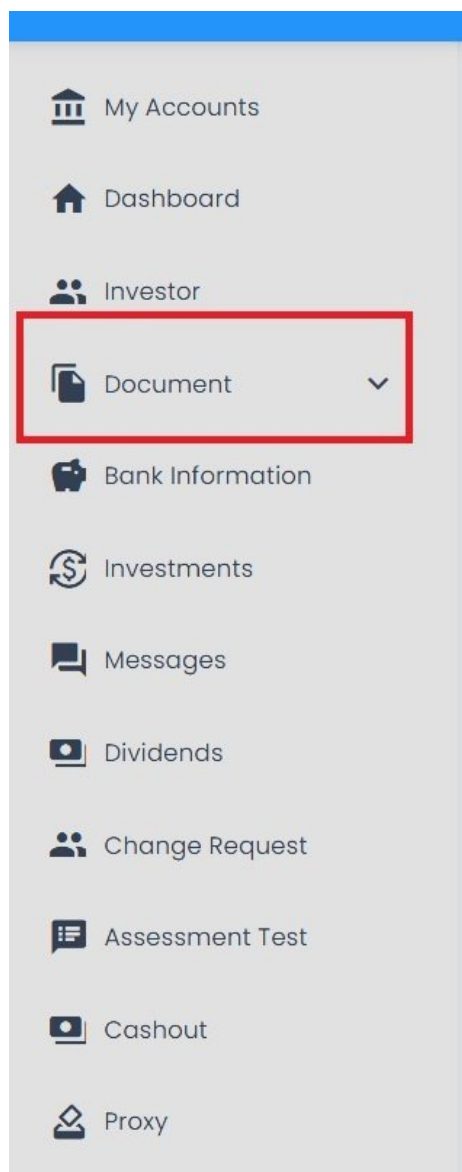


Fig. 20: Document Section Location

III.1 Document Categories

The **Document** section contains two main areas:

Financial Documents

Access and download your financial statements, tax documents, and other financial records.

Offering Signed Documents

View and download signed documents related to your investment offerings and agreements.

Financial Documents

The **Financial Documents** section allows you to access and download your financial records.

Location
Investor Portal > Document > Financial Documents

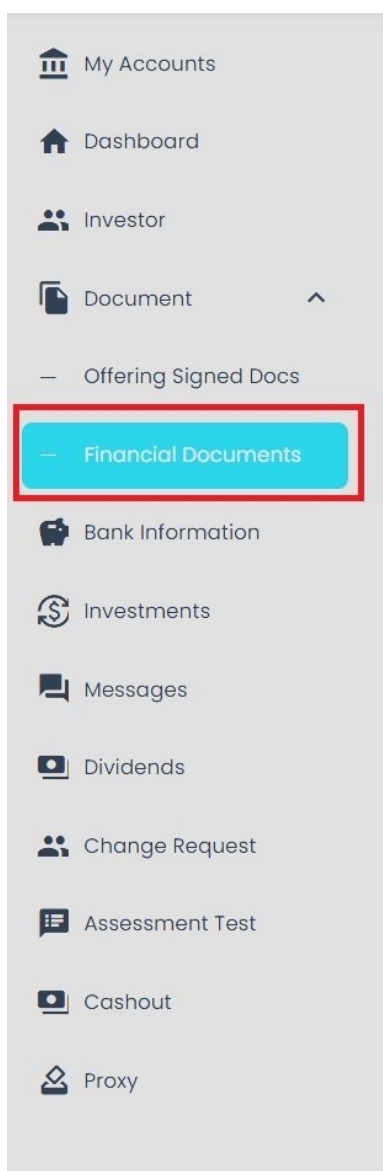


Fig. 21: Financial Documents Section Location

Document Filtering

Search Documents

You can search for specific documents using the search bar:

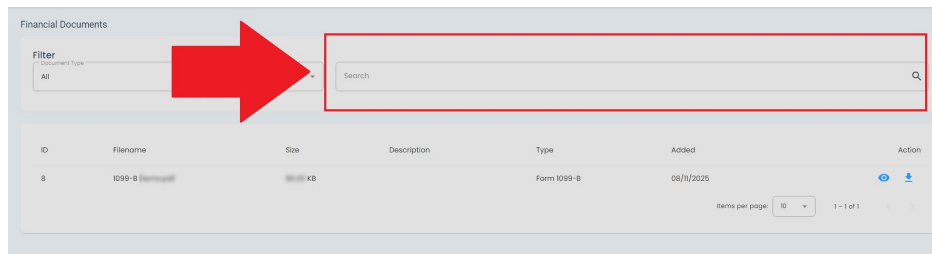


Fig. 22: Search Bar Location

Filter by Document Type

Use the document type dropdown to filter by category:

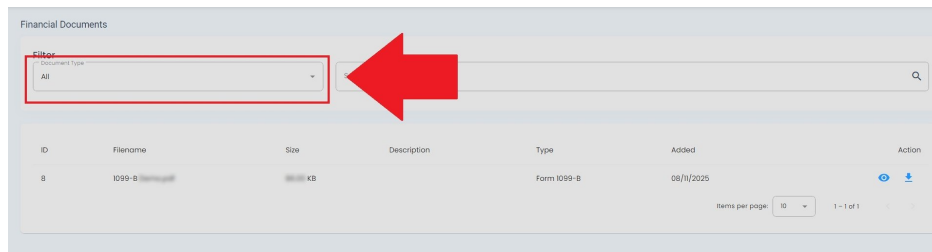


Fig. 23: Document Type Filter Dropdown

Financial Documents Table

The **Financial Documents List** table displays your financial documents and tax forms.

Columns: Financial Documents List Table

The **Columns** for the **Financial Documents List** table can be found at the top of the table:

Financial Documents						
<div> <div>Filter</div> <div>Document Type</div> <div>All</div> <div>Search</div> </div>						
ID	Filename	Size	Description	Type	Added	Action
8	1099-B	1099-B	Form 1099-B	Form 1099-B	08/11/2025	View Download
<div>Items per page: 10 1 - 1 of 1</div>						

Fig. 24: Financial Documents Table Column Headers

The **Financial Documents List** table includes the following columns:

- **ID** Unique identifier for the financial document
- **Filename** Name of the uploaded document file
- **Size** File size of the document

- **Date Uploaded** Date when the document was uploaded
- **Action** Available actions for viewing or downloading the document

Available Actions

View Document Details

To view detailed information about a document:

1. **Select** the **View Details** button for the document you want to review.

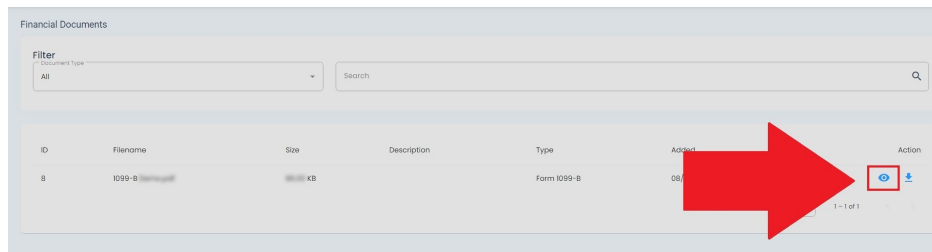
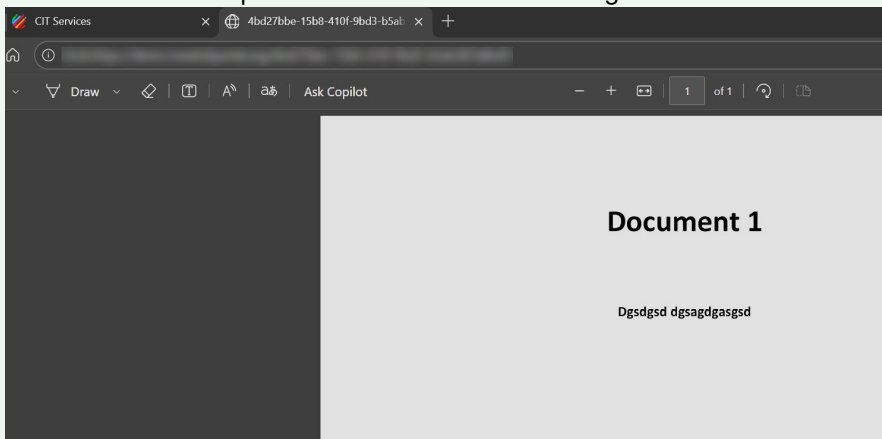


Fig. 25: View Document Details Button

Action Complete

The document will open in a new window for viewing.



Document Opens in New Window

Download Document

To download a document to your device:

1. **Select** the **Download** button for the document you want to save.

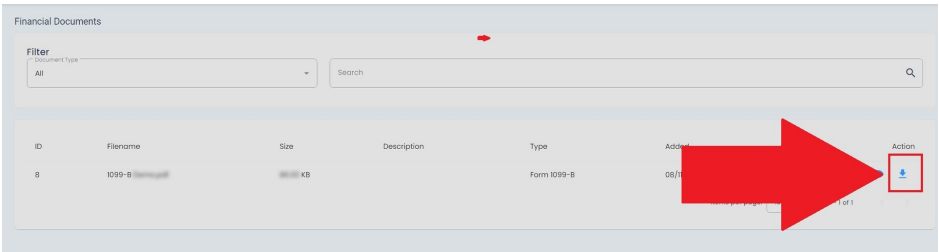


Fig. 26: Download Document Button

Offering Signed Documents

The **Offering Signed Documents** section provides access to all signed documents related to your investment offerings.

Location

Investor Portal > Document > Offering Signed Documents

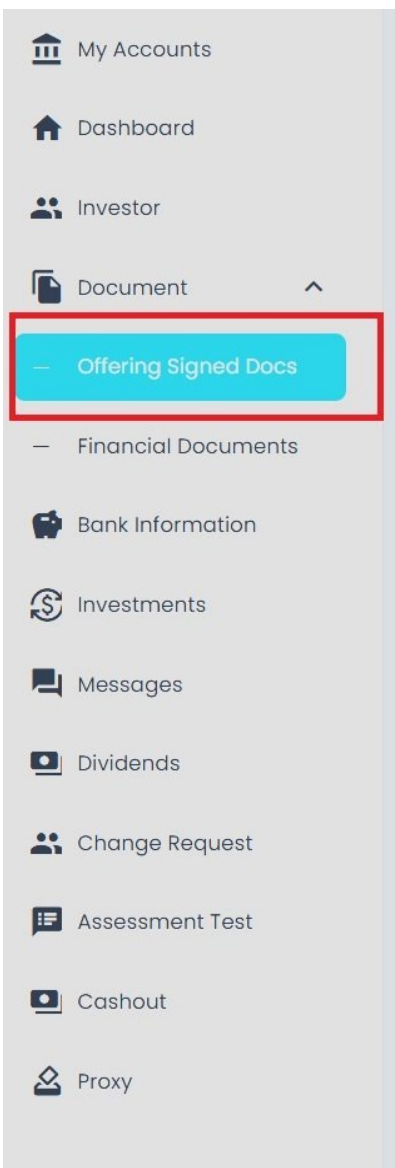


Fig. 27: Offering Signed Documents Section Location

CIT Corporation Filter

Filter documents by CIT Corporation using the dropdown menu:

1. **Select** the CIT Corporation dropdown.

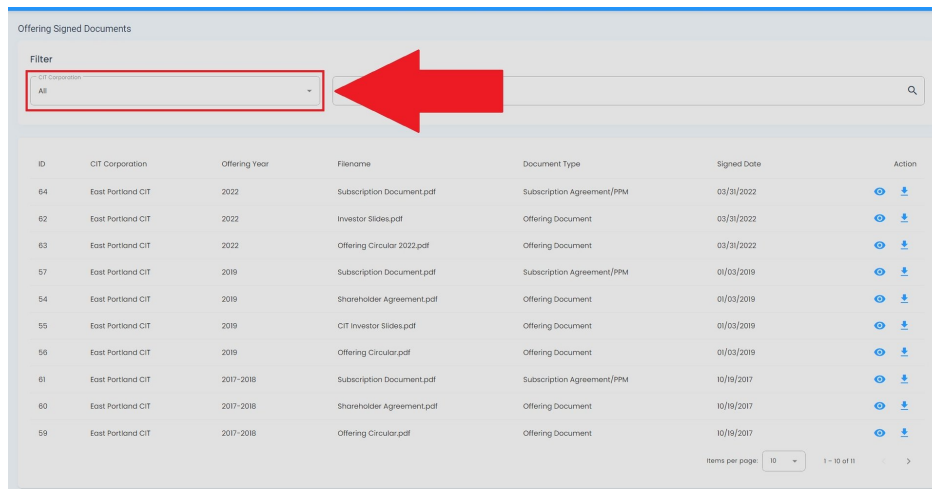


Fig. 28: CIT Corporation Dropdown Location

2. Choose from the available CIT Corporations.

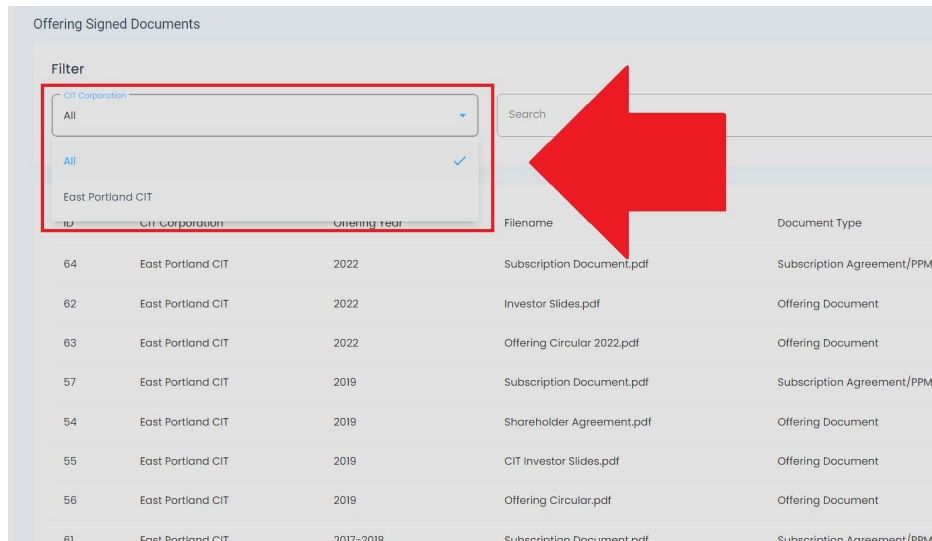


Fig. 29: CIT Corporation Dropdown Expanded

Offering Documents Table

The **Offering Signed Documents List** table displays your signed investment agreements.

Columns: Offering Signed Documents List Table

The **Columns** for the **Offering Signed Documents List** table can be found at the top of the table:

Offering Signed Documents

Filter

CIT Corporation: All Search

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
64	East Portland CIT	2022	Subscription Document.pdf	Subscription Agreement/PPM	03/31/2022	
62	East Portland CIT	2022	Investor Slides.pdf	Offering Document	03/31/2022	
63	East Portland CIT	2022	Offering Circular 2022.pdf	Offering Document	03/31/2022	
57	East Portland CIT	2019	Subscription Document.pdf	Subscription Agreement/PPM	01/03/2019	
54	East Portland CIT	2019	Shareholder Agreement.pdf	Offering Document	01/03/2019	
55	East Portland CIT	2019	CIT Investor Slides.pdf	Offering Document	01/03/2019	
56	East Portland CIT	2019	Offering Circular.pdf	Offering Document	01/03/2019	
61	East Portland CIT	2017-2018	Subscription Document.pdf	Subscription Agreement/PPM	10/19/2017	
60	East Portland CIT	2017-2018	Shareholder Agreement.pdf	Offering Document	10/19/2017	
59	East Portland CIT	2017-2018	Offering Circular.pdf	Offering Document	10/19/2017	

Items per page: 10 1 - 10 of 11

Fig. 30: Offering Signed Documents Table Column Headers

The **Offering Signed Documents List** table includes the following columns:

- **ID** Unique identifier for the document record
- **CIT Corporation** Corporation associated with this document
- **Offering Year** Year of the offering the document relates to
- **Document Name** Name of the signed document
- **Action** Available actions for viewing or downloading the document

Available Actions

View Document Details

To view details about a signed offering document:

1. **Select** the **View Details** button for the document you want to review.
2. The document details will be displayed.

Download Document





















To download a signed offering document:

1. From the document details view, **Select** the **Download** button.

CIT Investor Manual, Release 1

Offering Signed Documents

Filter
CIT Corporation
All Search





















ID	CIT Corporation	Offering Year	Filename	Document Type	Document Date	Action
64	East Portland CIT	2022	Subscription Document.pdf	Subscription Agreement/PPM		 
62	East Portland CIT	2022	Investor Slides.pdf	Offering Document		 
63	East Portland CIT	2022	Offering Circular 2022.pdf	Offering Document	03/31/22	 
57	East Portland CIT	2019	Subscription Document.pdf	Subscription Agreement/PPM	01/03/2019	 
54	East Portland CIT	2019	Shareholder Agreement.pdf	Offering Document	01/03/2019	 
55	East Portland CIT	2019	CIT Investor Slides.pdf	Offering Document	01/03/2019	 
56	East Portland CIT	2019	Offering Circular.pdf	Offering Document	01/03/2019	 
61	East Portland CIT	2017-2018	Subscription Document.pdf	Subscription Agreement/PPM	10/18/2017	 
60	East Portland CIT	2017-2018	Shareholder Agreement.pdf	Offering Document	10/18/2017	 
59	East Portland CIT	2017-2018	Offering Circular.pdf	Offering Document	10/18/2017	 

Items per page: 10 1 - 10 of 11

Fig. 31: View Details Button Location

Offering Signed Documents

Filter
CIT Corporation
All Search




















ID	CIT Corporation	Offering Year	Filename	Document Type	Document Date	Action
64	East Portland CIT	2022	Subscription Document.pdf	Subscription Agreement/PPM		 
62	East Portland CIT	2022	Investor Slides.pdf	Offering Document		 
63	East Portland CIT	2022	Offering Circular 2022.pdf	Offering Document	03/31/22	 
57	East Portland CIT	2019	Subscription Document.pdf	Subscription Agreement/PPM	01/03/2019	 
54	East Portland CIT	2019	Shareholder Agreement.pdf	Offering Document	01/03/2019	 
55	East Portland CIT	2019	CIT Investor Slides.pdf	Offering Document	01/03/2019	 
56	East Portland CIT	2019	Offering Circular.pdf	Offering Document	01/03/2019	 
61	East Portland CIT	2017-2018	Subscription Document.pdf	Subscription Agreement/PPM	10/18/2017	 
60	East Portland CIT	2017-2018	Shareholder Agreement.pdf	Offering Document	10/18/2017	 
59	East Portland CIT	2017-2018	Offering Circular.pdf	Offering Document	10/18/2017	 

Items per page: 10 1 - 10 of 11

Fig. 32: Document Details View

Offering Signed Documents

Filter
CIT Corporation
All Search

ID	CIT Corporation	Offering Year	Filename	Document Type	Document Date	Action
64	East Portland CIT	2022	Subscription Document.pdf	Subscription Agreement/PPM		
62	East Portland CIT	2022	Investor Slides.pdf	Offering Document		 
63	East Portland CIT	2022	Offering Circular 2022.pdf	Offering Document	03/31/22	 
57	East Portland CIT	2019	Subscription Document.pdf	Subscription Agreement/PPM	01/03/2019	 
54	East Portland CIT	2019	Shareholder Agreement.pdf	Offering Document	01/03/2019	 
55	East Portland CIT	2019	CIT Investor Slides.pdf	Offering Document	01/03/2019	 
56	East Portland CIT	2019	Offering Circular.pdf	Offering Document	01/03/2019	 
61	East Portland CIT	2017-2018	Subscription Document.pdf	Subscription Agreement/PPM	10/18/2017	 
60	East Portland CIT	2017-2018	Shareholder Agreement.pdf	Offering Document	10/18/2017	 
59	East Portland CIT	2017-2018	Offering Circular.pdf	Offering Document	10/18/2017	 

Items per page: 10 1 - 10 of 11

Fig. 33: Download Button Location

IV Bank Information

The **Bank Information** section allows you to manage your banking details for receiving cashouts and dividends.

Location

Investor Portal > Bank Information

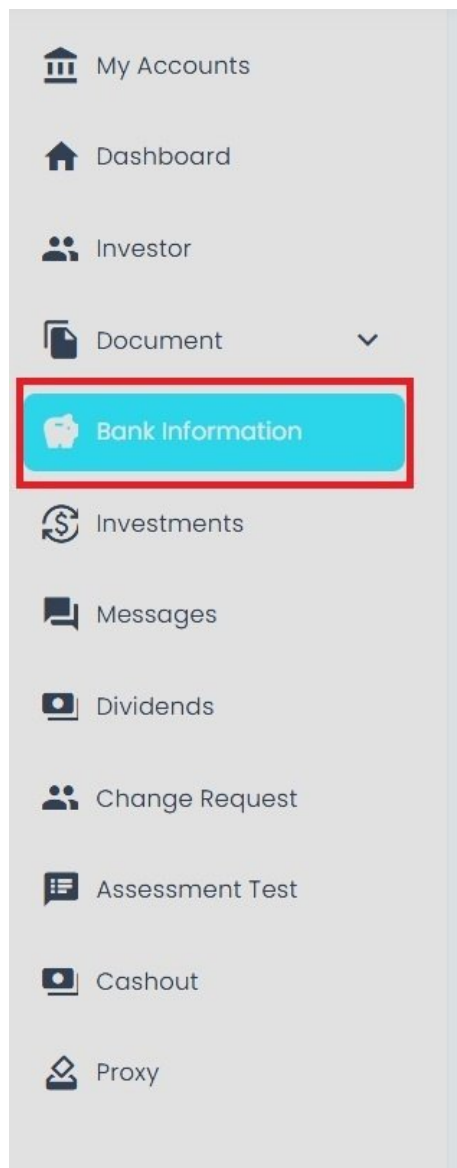


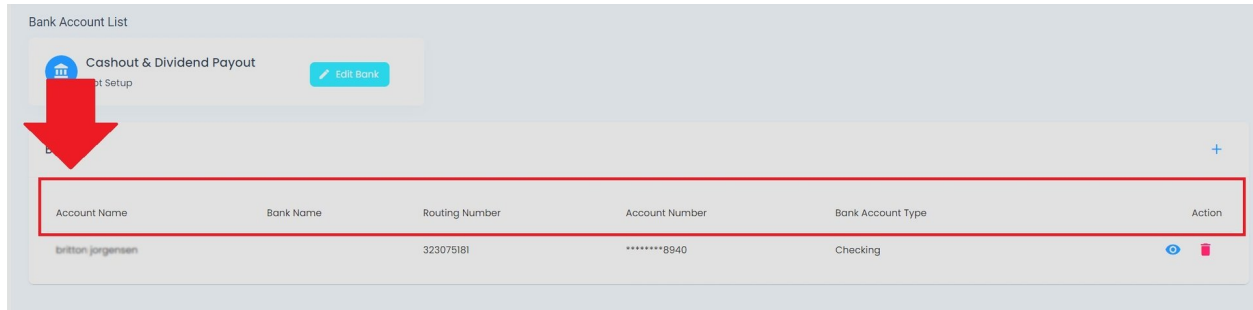
Fig. 34: Bank Information Tab Location

IV.1 Bank Information Table

The **Bank Information List** table displays your saved banking details.

IV.2 Columns: Bank Information List Table

The **Columns** for the **Bank Information List** table can be found at the top of the table:



Bank Account List

Cashout & Dividend Payout
Not Setup [Edit Bank](#)

Account Name	Bank Name	Routing Number	Account Number	Bank Account Type	Action
britton.jorgensen		323075181	*****8940	Checking	View Delete

Fig. 35: Bank Information Table Column Headers

The **Bank Information List** table includes the following columns:

- **Account Name** Name assigned to identify this bank account
- **Bank Name** Name of the financial institution
- **Routing Number** Ninedigit routing number identifying the bank
- **Account Number** Your account number at the bank
- **Bank Account Type** Type of account (Checking or Savings)
- **Action** Available actions for managing this bank account

IV.3 Available Actions

Add Bank

Note

You can also add a bank by selecting the Add Bank button on the Bank Information page.

To add a new bank account:

1. **Select** the **Add Bank** button.

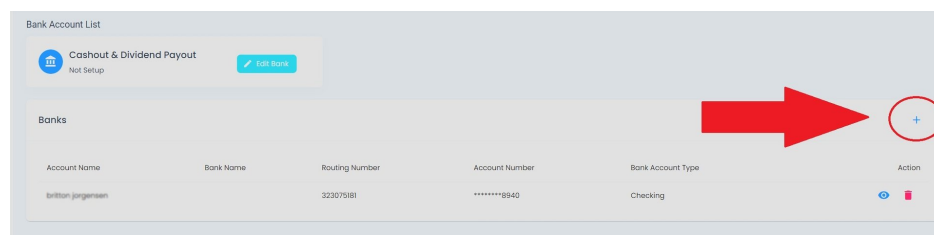


Fig. 36: Add Bank Button Location

IV.4 Edit Bank Details or Add Bank

Important

The only way to edit bank information is to add a new bank account. You cannot modify existing bank details directly.

To edit existing bank information:

1. Select the **Edit Bank** button for the bank account you want to modify.

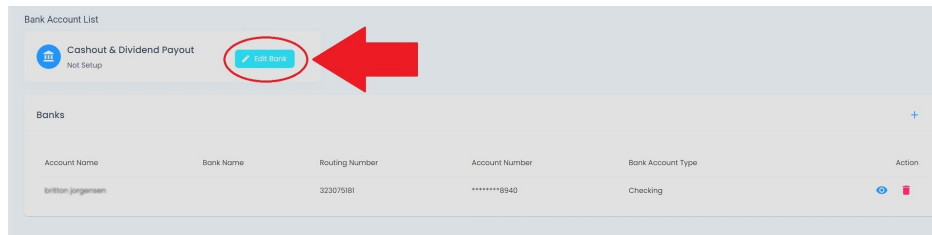


Fig. 37: Edit Bank Button Location

2. The Edit Bank popup will appear. To add a different bank, Select the **Add New Bank** button.

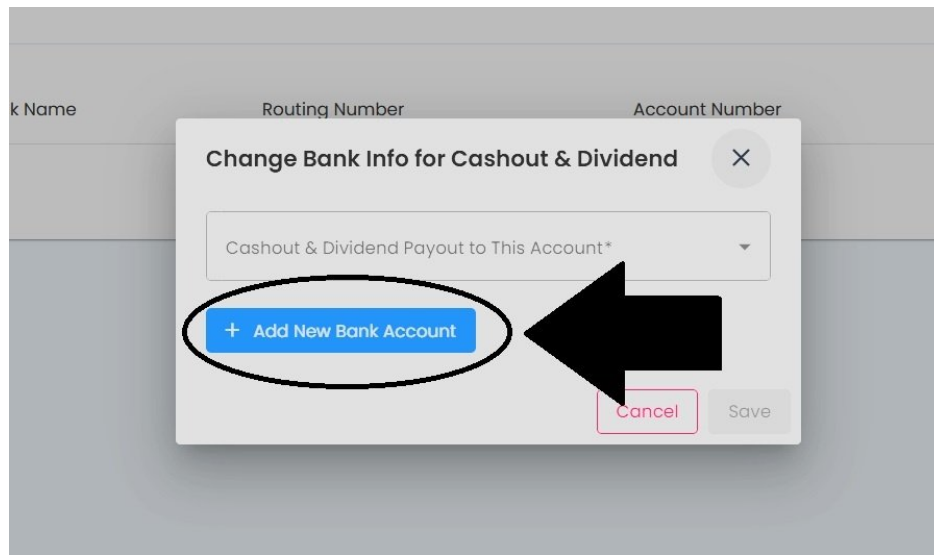
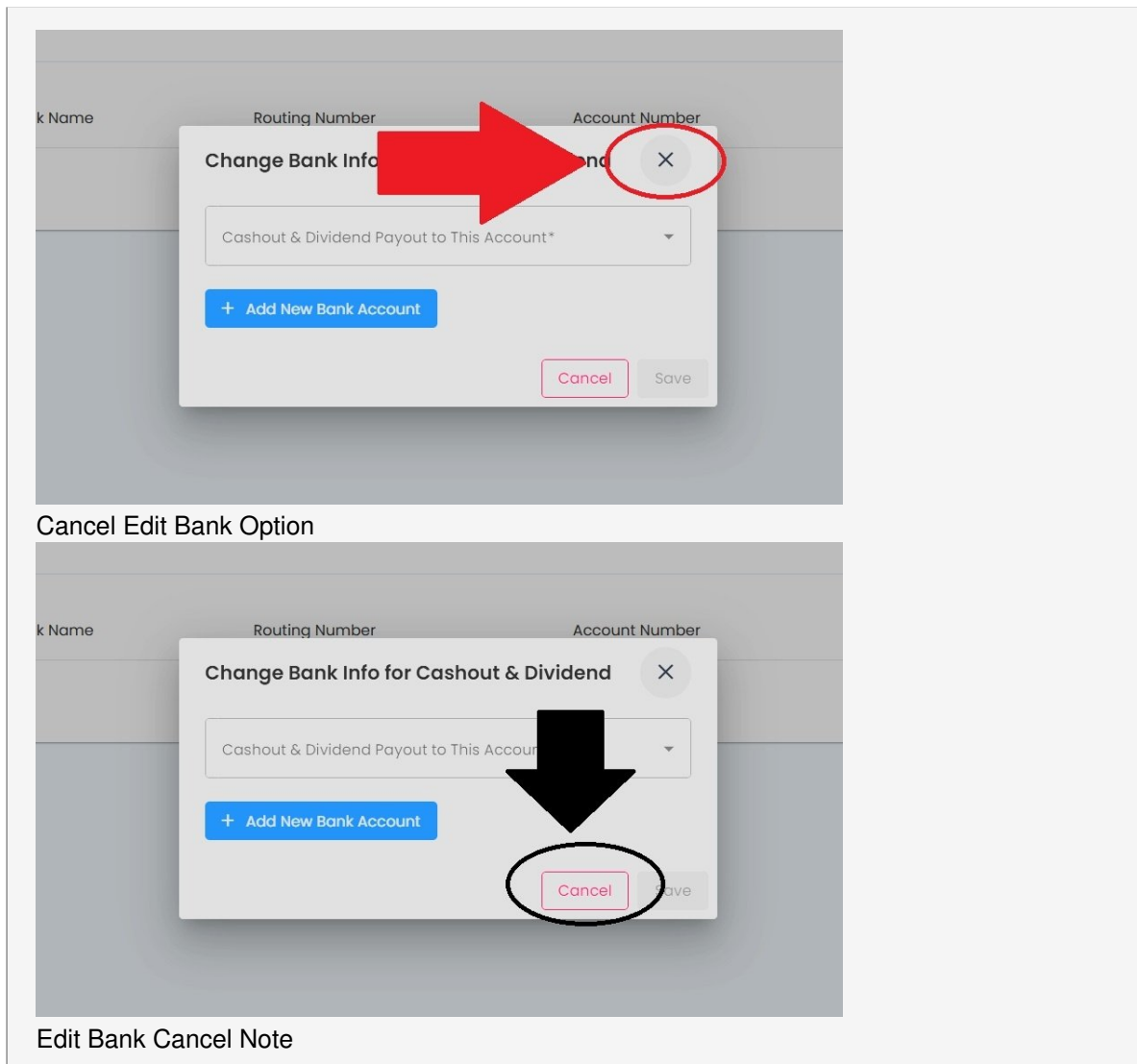


Fig. 38: Add New Bank Button on Edit Bank Popup

Cancel Option

Select the Cancel or X button if you would like to abort the process.

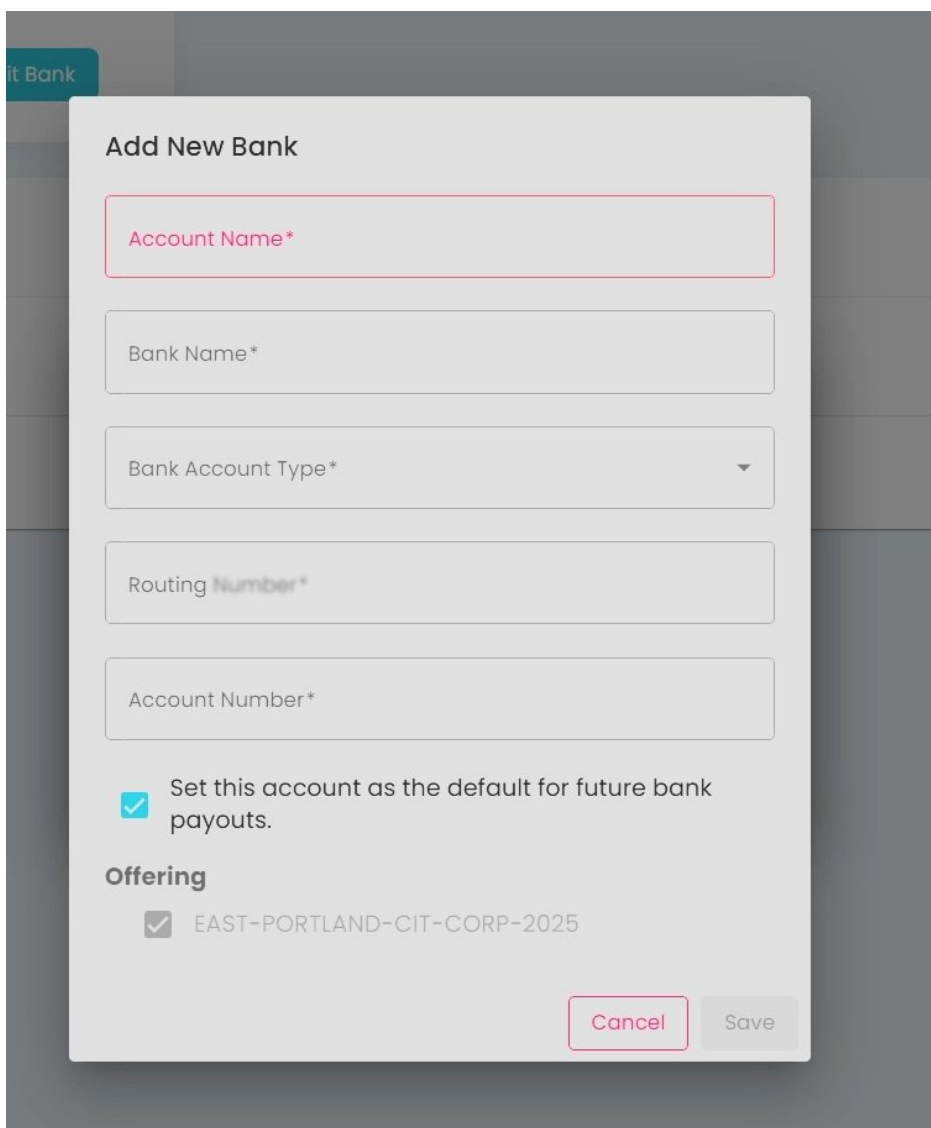


3. The Bank Information popup will appear where you can enter new bank details.
4. **Select** the dropdown menu to view available banks.
5. Choose your bank from the list.
6. **Select** **Save** to confirm your selection.
7. Verify that your new bank has been added to the main screen.

View Bank Details

To view detailed bank information:

1. **Select** the **View Bank Details** button for the bank account you want to review.

A modal popup window titled "Add New Bank" is displayed over a blurred background. The form contains several input fields: "Account Name*" (highlighted with a red border), "Bank Name*", "Bank Account Type*" (a dropdown menu), "Routing Number*", and "Account Number*". Below these fields is a checkbox labeled "Set this account as the default for future bank payouts." which is checked. Under the heading "Offering", there is a checked checkbox next to the text "EAST-PORTLAND-CIT-CORP-2025". At the bottom right of the form are two buttons: "Cancel" (highlighted with a red border) and "Save".

it Bank

Add New Bank

Account Name*

Bank Name*

Bank Account Type*

Routing Number*

Account Number*

☒ Set this account as the default for future bank payouts.

Offering

☒ EAST-PORTLAND-CIT-CORP-2025

Cancel Save

Fig. 39: Bank Information Popup

Remove Bank

To remove a bank account from your profile:

1. Select the **Remove Bank** button for the bank account you want to delete.

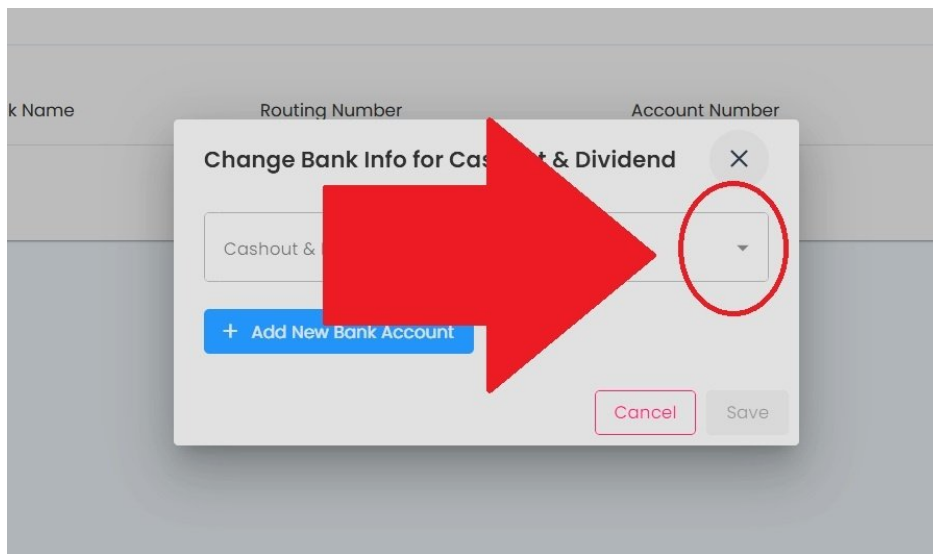


Fig. 40: Bank Selection Dropdown

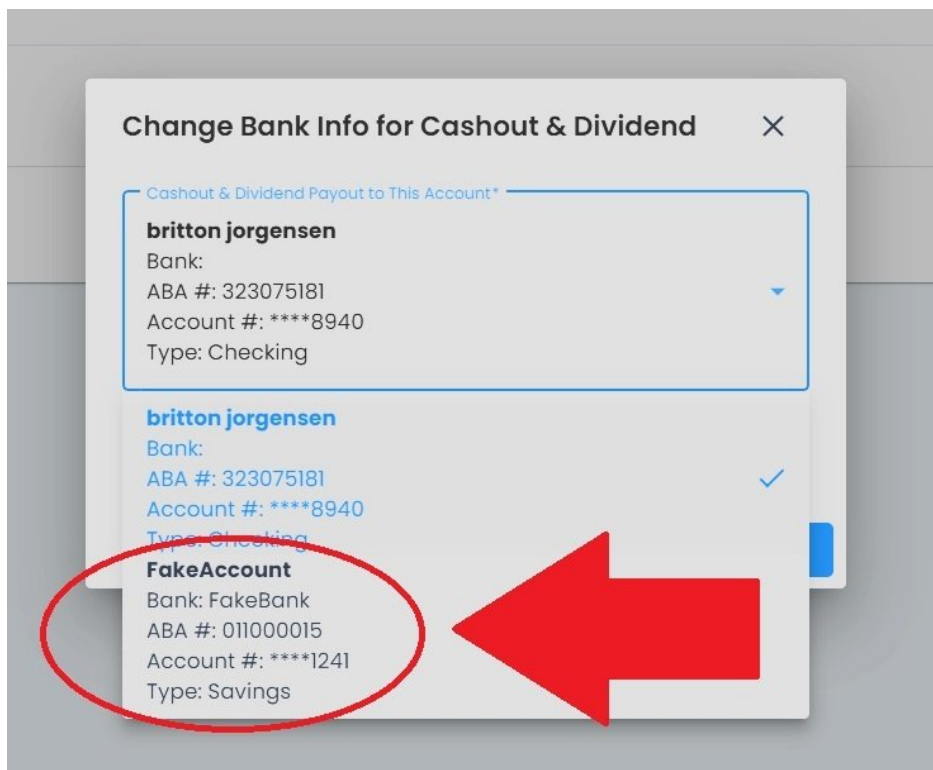


Fig. 41: Bank Selection Menu

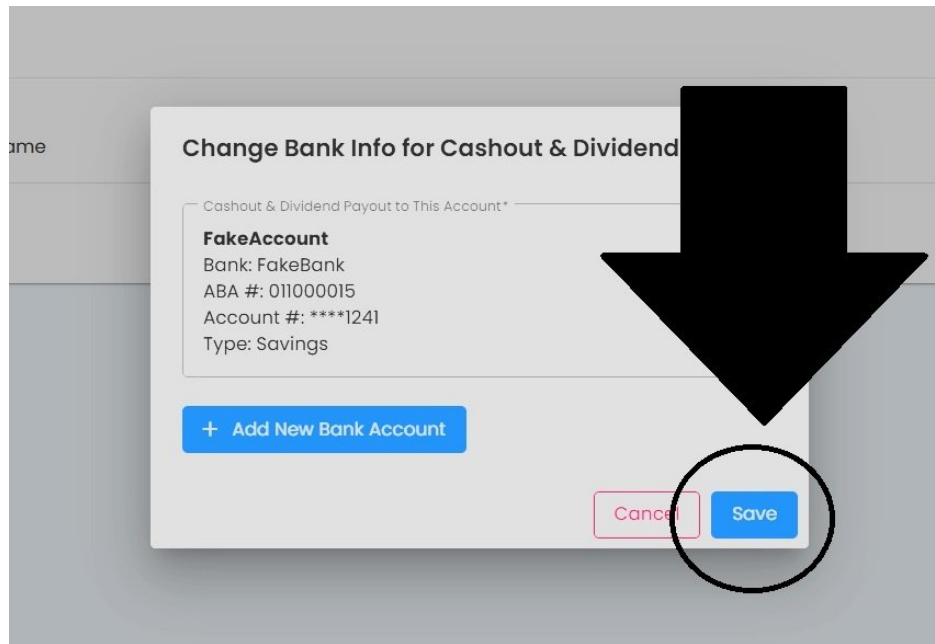


Fig. 42: Save Bank Selection

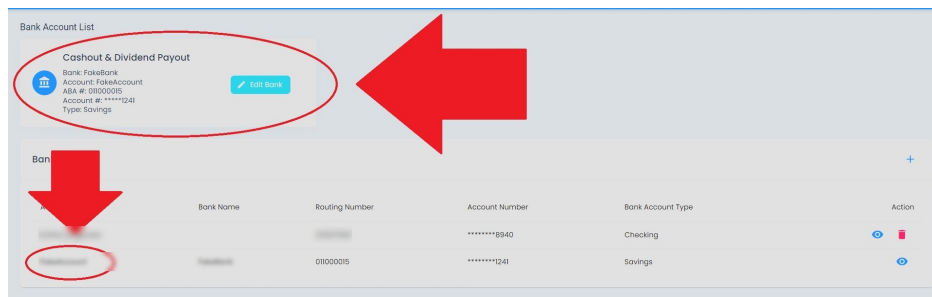


Fig. 43: Bank Successfully Added

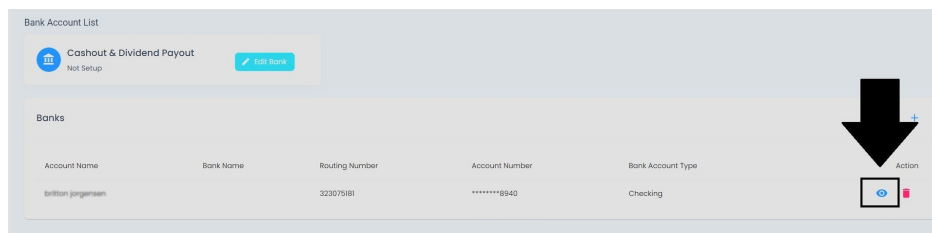


Fig. 44: View Bank Details Button Location

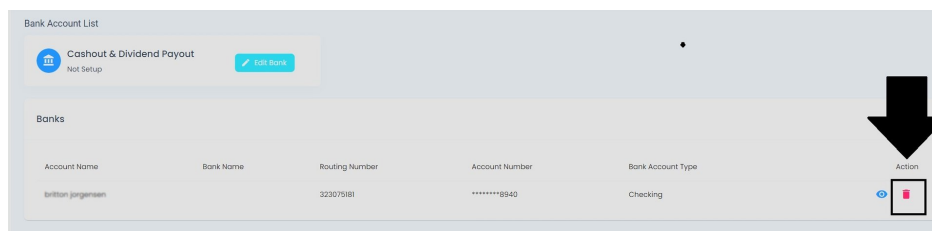


Fig. 45: Remove Bank Button Location

V Holdings

The **Holdings** section displays your investment certificates and share ownership records within the Investor Portal.

Table of Contents

- [Holdings Homepage](#)
- [Features: Holdings](#)
- [Columns: Holdings List Table](#)
- [How to Filter Holdings](#)
 - [Step 1: Locate the Status Filter](#)
 - [Step 2: Select Filter Option](#)
 - [Step 3: View Filtered Results](#)
- [Empty Holdings State](#)
- [Navigation Location](#)
- [Pagination Controls](#)

Hover for Page Preview

Hover over the links for a page preview.

V.1 Holdings Homepage

The **Holdings** section opens to the **Holdings List** table:

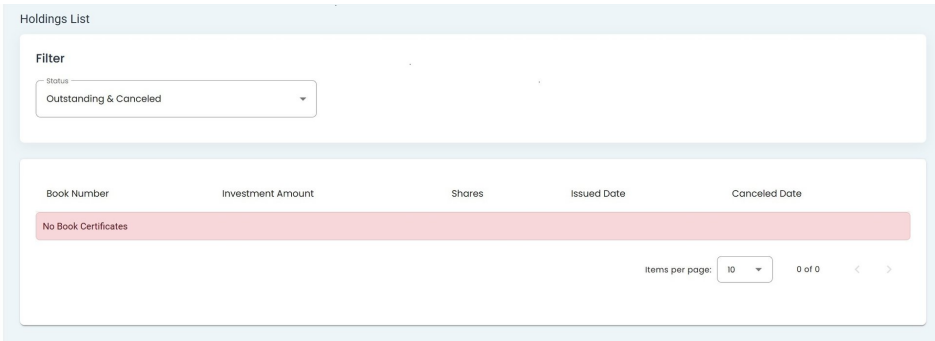


Fig. 46: Investor Portal, Holdings, Homepage

V.2 Features: Holdings

- View all investment certificates
- Filter holdings by status (Outstanding, Canceled, or Both)
- Track share quantities and investment amounts

- Monitor certificate issue and cancellation dates
- Access detailed holding information

V.3 Columns: Holdings List Table

The **Columns** for the **Holdings List** table can be found at the top of the table:

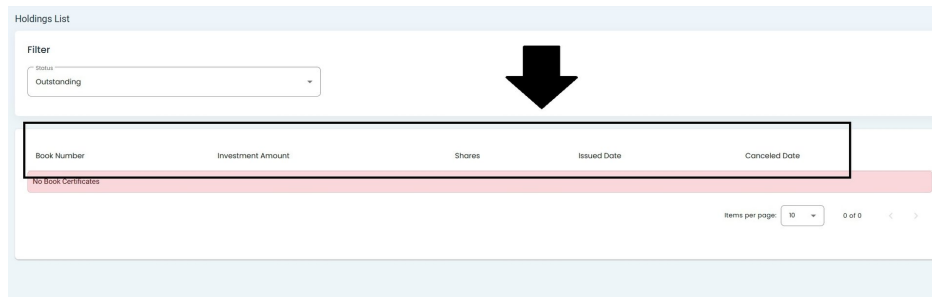


Fig. 47: Holdings Table Column Headers

The **Holdings List** table includes the following columns:

- **Book Number** Unique identifier for your certificate
- **CIT Corporation** Corporation in which shares are held
- **Investment Amount** Total amount invested
- **Shares** Number of shares owned
- **Issued Date** Certificate issue date
- **Canceled Date** Cancellation date (if applicable)

V.4 How to Filter Holdings

To filter your holdings by status:

Step 1: Locate the Status Filter

Find the Status dropdown in the Filter section:

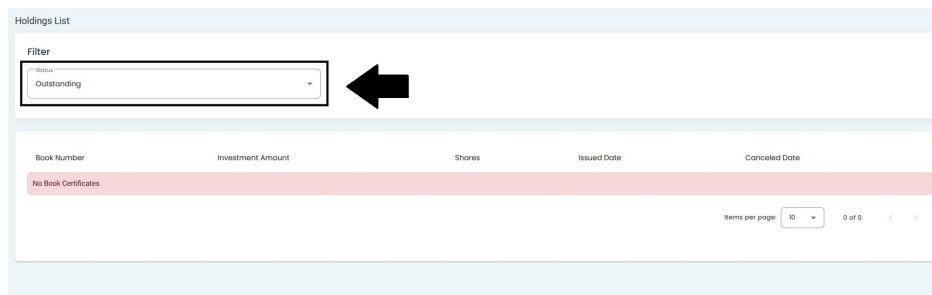


Fig. 48: Investor Portal, Holdings, Status Filter Location

Step 2: Select Filter Option

Click the dropdown to view available filter options:

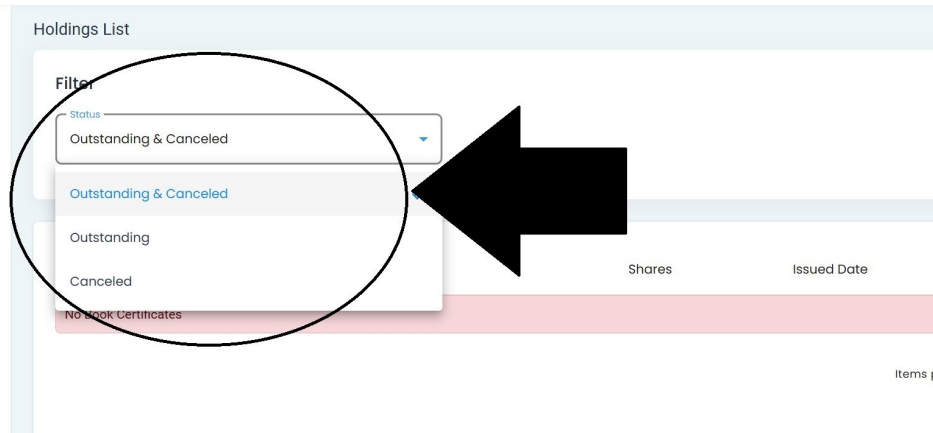


Fig. 49: Investor Portal, Holdings, Filter Options

Available options:

- **Outstanding** View active certificates only
- **Canceled** View canceled certificates only
- **Outstanding & Canceled** View all certificates

Understanding Holdings Status

Outstanding Holdings represent your active investment certificates that:

- Generate dividend payments
- Are eligible for cashout requests
- Represent current investment value
- Display only the Issued Date

Canceled Holdings are certificates that have been:

- Fully cashed out
- Redeemed by the corporation
- Terminated for other reasons
- Display both Issued Date and Canceled Date

Step 3: View Filtered Results

The table automatically updates to show holdings matching your selected criteria:

V.5 Empty Holdings State

When no holdings match your filter criteria:

Note

The “No Book Certificates” message appears when no holdings match your current filter settings.

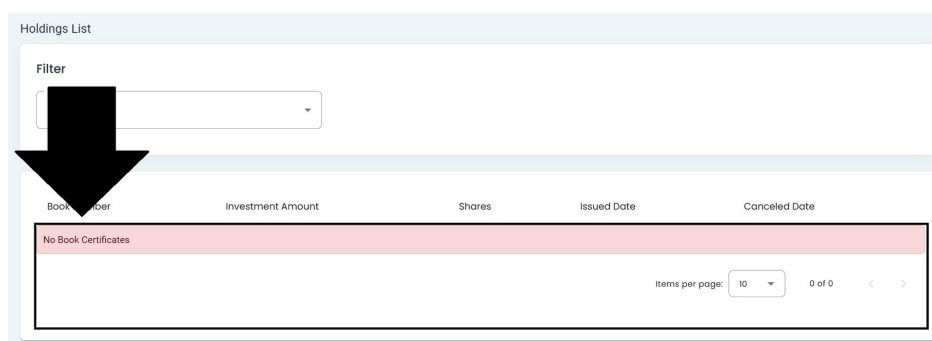


Fig. 50: Investor Portal, Holdings, Filtered Results

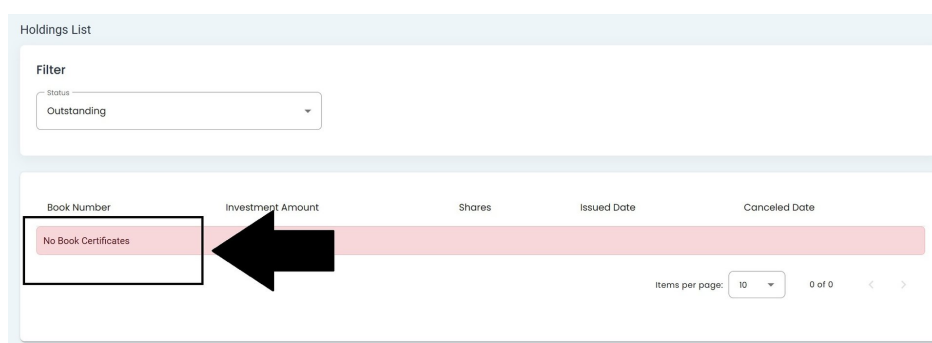


Fig. 51: Investor Portal, Holdings, No Book Certificates Message

V.6 Navigation Location

Access Holdings from the Investor Portal navigation menu:

V.7 Pagination Controls

Navigate through multiple holdings using the pagination controls at the bottom of the table:

- Select items per page (10, 25, 50, or 100)
- Use navigation arrows to move between pages
- View total record count

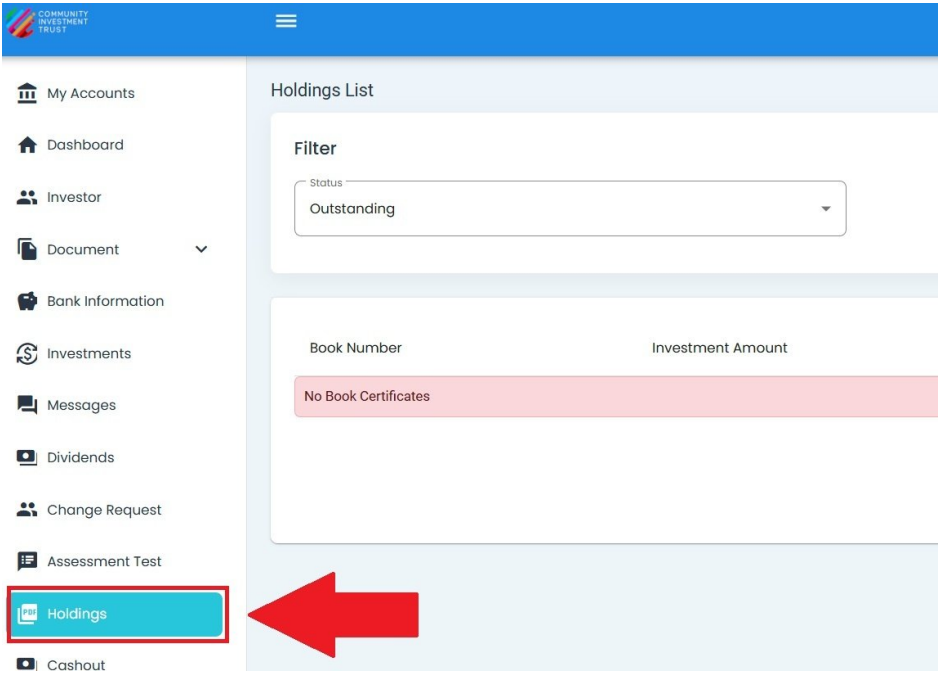


Fig. 52: Investor Portal, Holdings, Navigation Menu Location

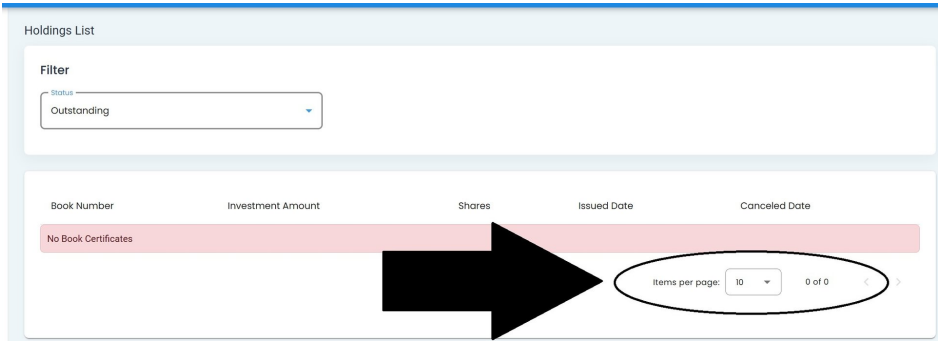


Fig. 53: Investor Portal, Holdings, Pagination Controls

VI Dividends

The **Dividends** section allows you to track dividend payments from your investments.

VI.1 Dividends Homepage

The **Dividends** section displays the **Dividends List** table with all your dividend payment records.

VI.2 How to Filter by Corporation

Locate Corporation Dropdown

Find the CIT Corporation dropdown filter:

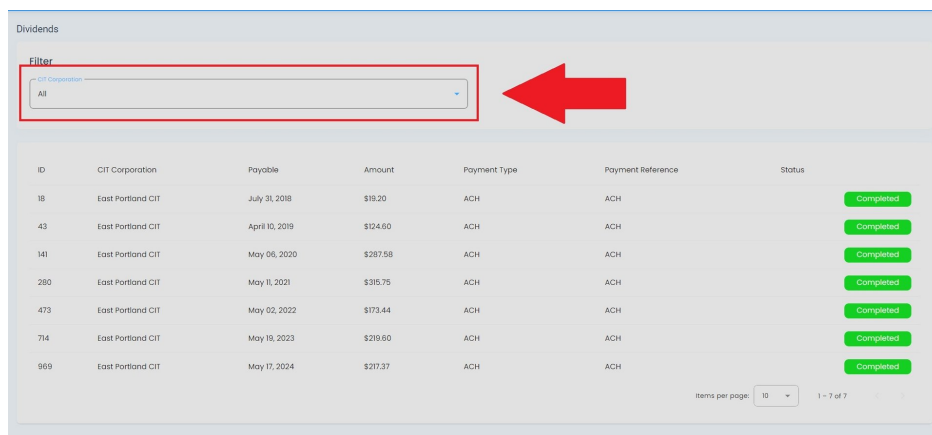


Fig. 54: Investor Portal, Dividends, Corporation Filter Dropdown

Select Corporation

Click the dropdown to view available corporations:

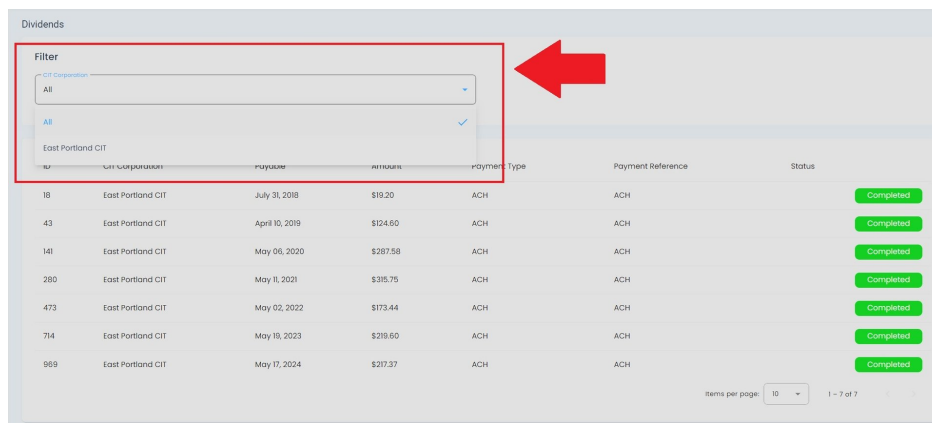
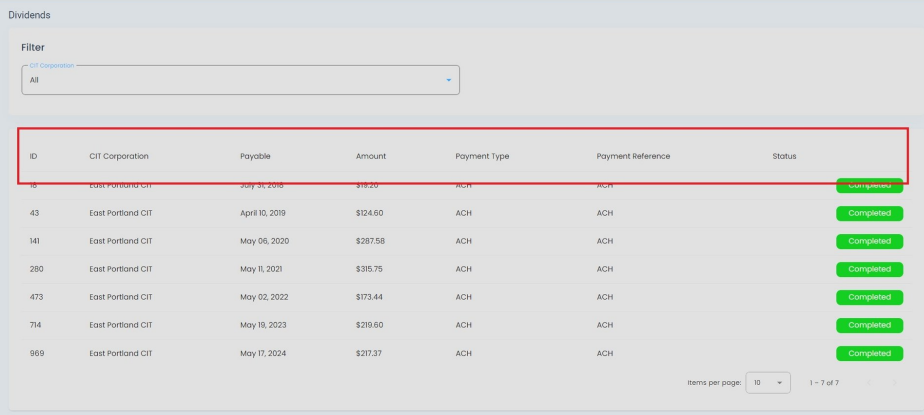


Fig. 55: Investor Portal, Dividends, Corporation Dropdown Expanded

The table automatically updates to show dividends from the selected corporation.

VI.3 Table Columns



Dividends

Filter
CIT Corporation
All

ID	CIT Corporation	Payable	Amount	Payment Type	Payment Reference	Status
18	East Portland CIT	July 31, 2018	\$19.20	ACH	ACH	Completed
43	East Portland CIT	April 10, 2019	\$124.60	ACH	ACH	Completed
141	East Portland CIT	May 06, 2020	\$287.58	ACH	ACH	Completed
280	East Portland CIT	May 11, 2021	\$315.75	ACH	ACH	Completed
473	East Portland CIT	May 02, 2022	\$173.44	ACH	ACH	Completed
714	East Portland CIT	May 19, 2023	\$219.60	ACH	ACH	Completed
969	East Portland CIT	May 17, 2024	\$217.37	ACH	ACH	Completed

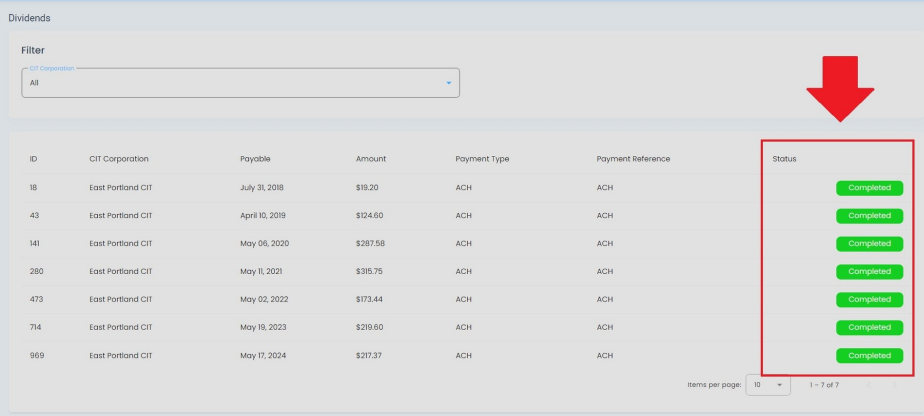
Items per page: 10 1 - 7 of 7

Fig. 56: Investor Portal, Dividends, Column Headers

The dividend table displays:

- **ID** Unique dividend identifier
- **CIT Corporation** Issuing corporation
- **Payable** Payment date
- **Amount** Dividend amount
- **Payment Type** Distribution method
- **Payment Reference** Transaction reference
- **Status** Payment status

VI.4 Payment Status



Dividends

Filter
CIT Corporation
All

ID	CIT Corporation	Payable	Amount	Payment Type	Payment Reference	Status
18	East Portland CIT	July 31, 2018	\$19.20	ACH	ACH	Completed
43	East Portland CIT	April 10, 2019	\$124.60	ACH	ACH	Completed
141	East Portland CIT	May 06, 2020	\$287.58	ACH	ACH	Completed
280	East Portland CIT	May 11, 2021	\$315.75	ACH	ACH	Completed
473	East Portland CIT	May 02, 2022	\$173.44	ACH	ACH	Completed
714	East Portland CIT	May 19, 2023	\$219.60	ACH	ACH	Completed
969	East Portland CIT	May 17, 2024	\$217.37	ACH	ACH	Completed

Items per page: 10 1 - 7 of 7

Fig. 57: Investor Portal, Dividends, Status Column

Common statuses include:

- **Paid** Successfully distributed

- **Pending** Awaiting processing
- **Scheduled** Future payment

Tip

Filter by corporation at yearend to simplify tax preparation.

VII Messages

The **Messages** section provides access to important communications and announcements related to your investments.

Table of Contents

- [Messages Homepage](#)
- [Features: Messages](#)
- [Layout: Messages Page](#)
- [Navigation Location](#)
- [How to Filter Messages](#)
 - [CIT Corporation Filter](#)
 - [Offering Filter](#)
 - * [Step 1: Locate the Offering Filter](#)
 - * [Step 2: Select Offering Option](#)
 - [Read/Unread Status Filter](#)
- [How to Search Messages](#)
 - [Step 1: Locate the Search Field](#)
 - [Step 2: Enter Search Terms](#)
- [Message Types](#)
- [How to Reply to Messages](#)
 - [Step 1: Locate the Reply Button](#)
 - [Step 2: Open Reply Window](#)
 - [Step 3: Compose Your Reply](#)
 - [Step 4: Send Your Reply](#)
 - [Step 5: View Reply Confirmation](#)

Hover for Page Preview

Hover over the links for a page preview.

VII.1 Messages Homepage

The **Messages** section opens to your investment communications center:

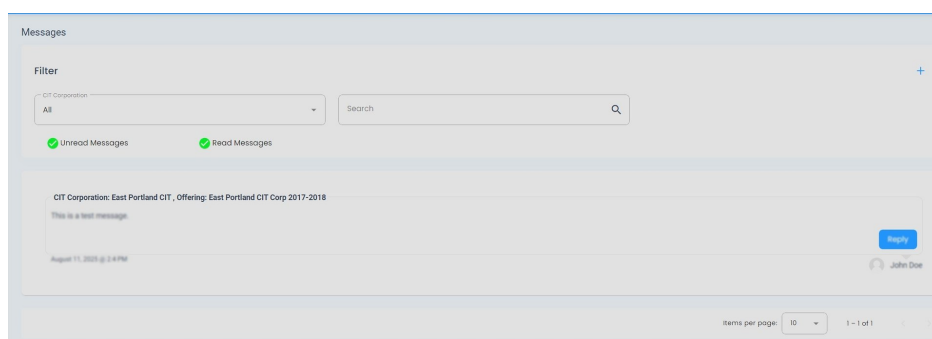


Fig. 58: Investor Portal, Messages, Homepage

VII.2 Features: Messages

- View investmentrelated communications
- Filter messages by corporation and offering
- Search for specific message content
- Track read/unread message status
- Access important announcements and updates

VII.3 Layout: Messages Page

The Messages page includes comprehensive filtering options and a message list:

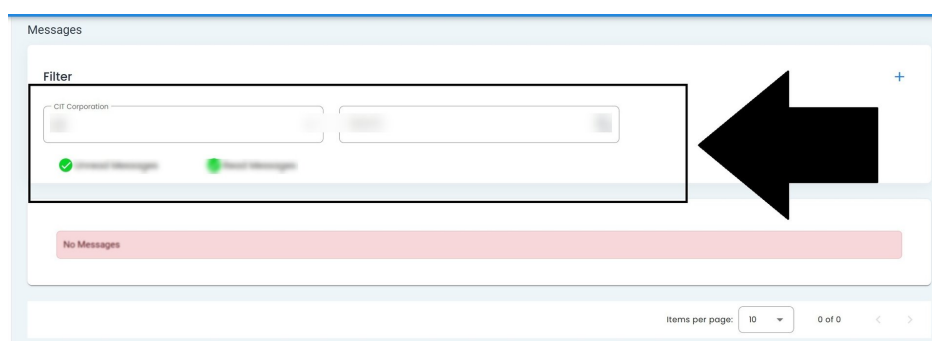


Fig. 59: Investor Portal, Messages, Page Layout

VII.4 Navigation Location

Access Messages from the Investor Portal navigation menu:

VII.5 How to Filter Messages

The Messages section provides multiple filtering options:

CIT Corporation Filter

Filter messages by specific corporations:

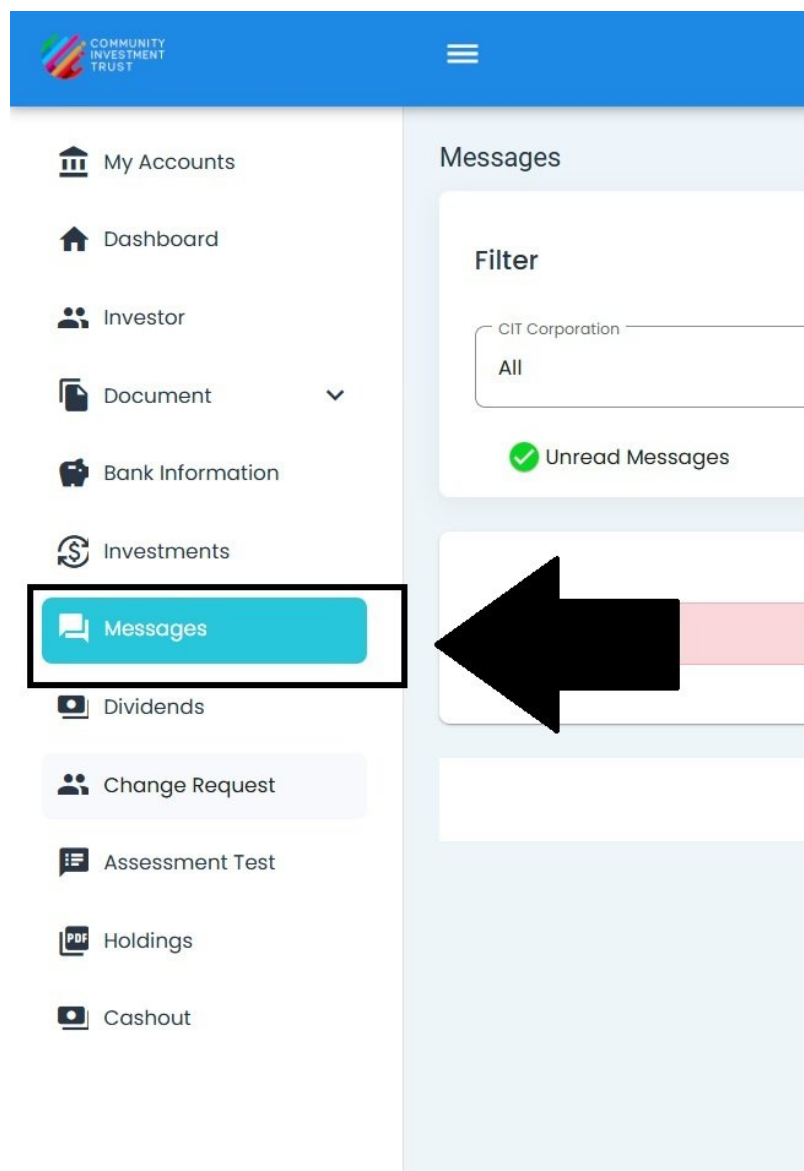


Fig. 60: Investor Portal, Messages, Navigation Menu Location

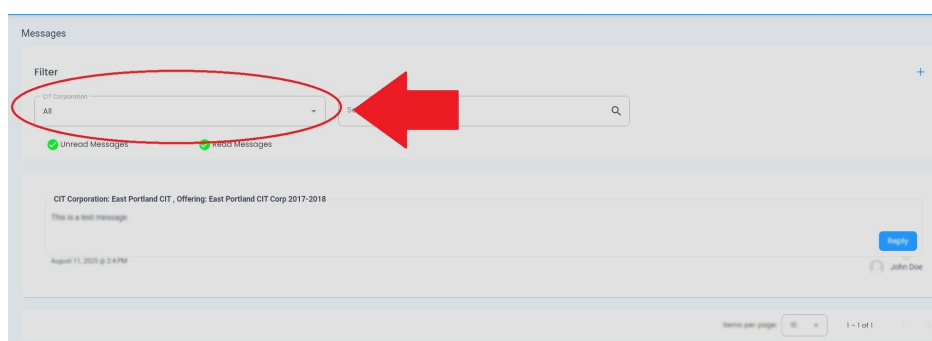


Fig. 61: Investor Portal, Messages, Corporation Filter Location

Offering Filter

Step 1: Locate the Offering Filter

Find the Offering dropdown in the Filter section:

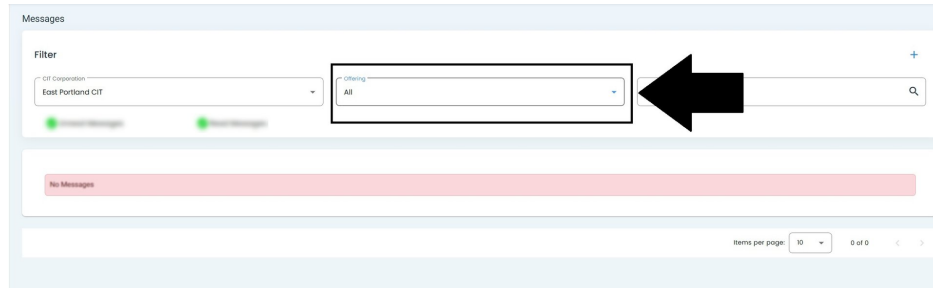


Fig. 62: Investor Portal, Messages, Offering Filter Location

Step 2: Select Offering Option

Click the dropdown to view available offerings:



Fig. 63: Investor Portal, Messages, Offering Filter Options

Read/Unread Status Filter

Filter by message status:

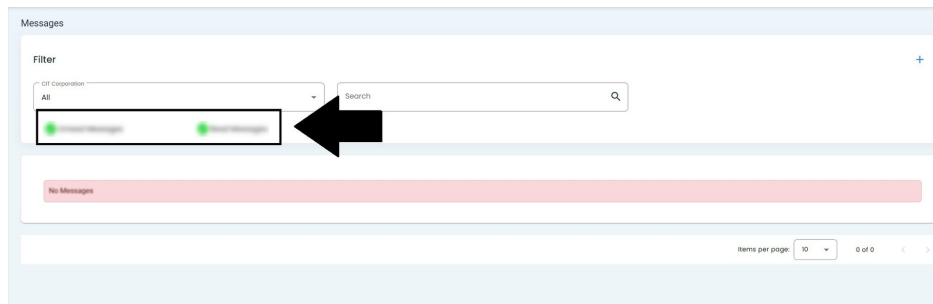


Fig. 64: Investor Portal, Messages, Read Status Filter

Filter options:

- **Read** Messages you have already viewed

- **Unread** New messages requiring attention

VII.6 How to Search Messages

Step 1: Locate the Search Field

Find the search bar in the Messages interface:

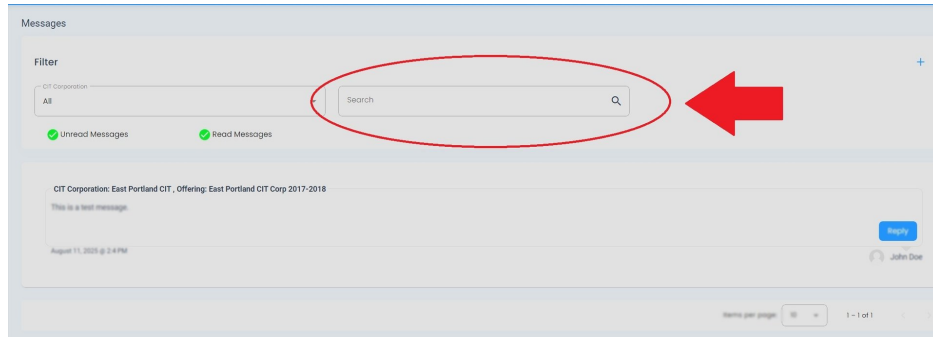


Fig. 65: Investor Portal, Messages, Search Field Location

Step 2: Enter Search Terms

Type keywords to find specific messages:

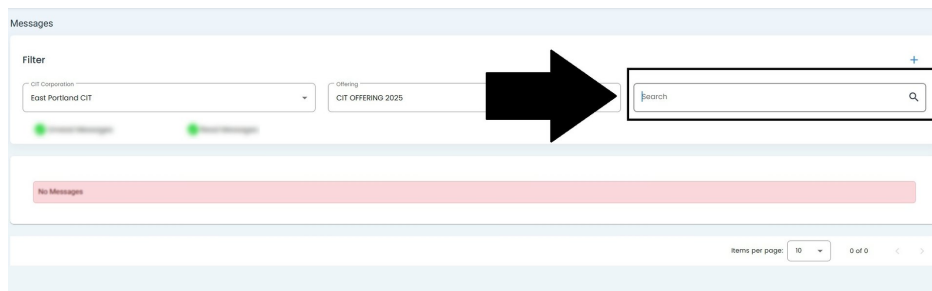


Fig. 66: Investor Portal, Messages, Search Example

Tip

Check messages regularly to stay informed about important updates affecting your investments, including dividend announcements and corporate actions.

VII.7 Message Types

Common message categories include:

Message Types

Investment Updates

- New offering announcements
- Investment performance reports
- Portfolio changes

Dividend Notifications

- Dividend declaration announcements
- Payment schedules
- Distribution details

Corporate Actions

- Merger and acquisition notices
- Stock splits or consolidations
- Voting information

Administrative

- Account updates
- Document availability
- System maintenance notices

Best Practices

Regular Review

1. **Check Weekly** Review unread messages regularly
2. **After Announcements** Filter by corporation after major news
3. **Search Topics** Use search for specific subjects

Organization

1. **Priority Messages** Read timesensitive messages first
2. **Important Dates** Note deadlines mentioned in messages
3. **Reference Numbers** Save for future lookup

Important

Some messages may require action on your part. Read all unread messages carefully to ensure you don't miss important deadlines or opportunities.

VII.8 How to Reply to Messages

The **Messages** section allows you to reply to communications from CIT Corporations.

Step 1: Locate the Reply Button

Find the **Reply** button on a message:

Step 2: Open Reply Window

Click **Reply** to open the message window:

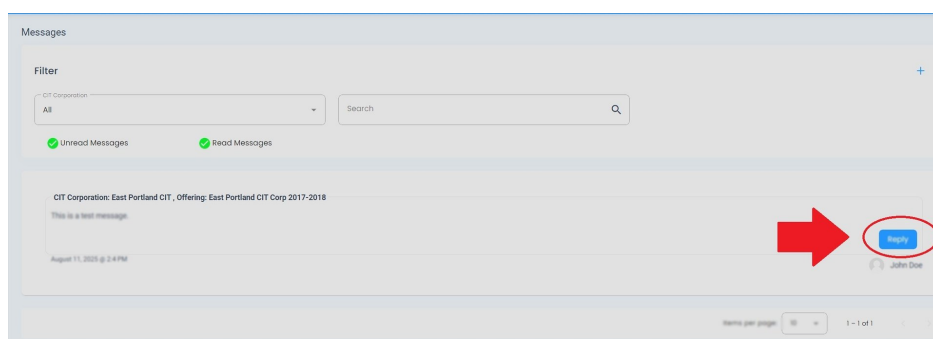


Fig. 67: Investor Portal, Messages, Reply Button Location

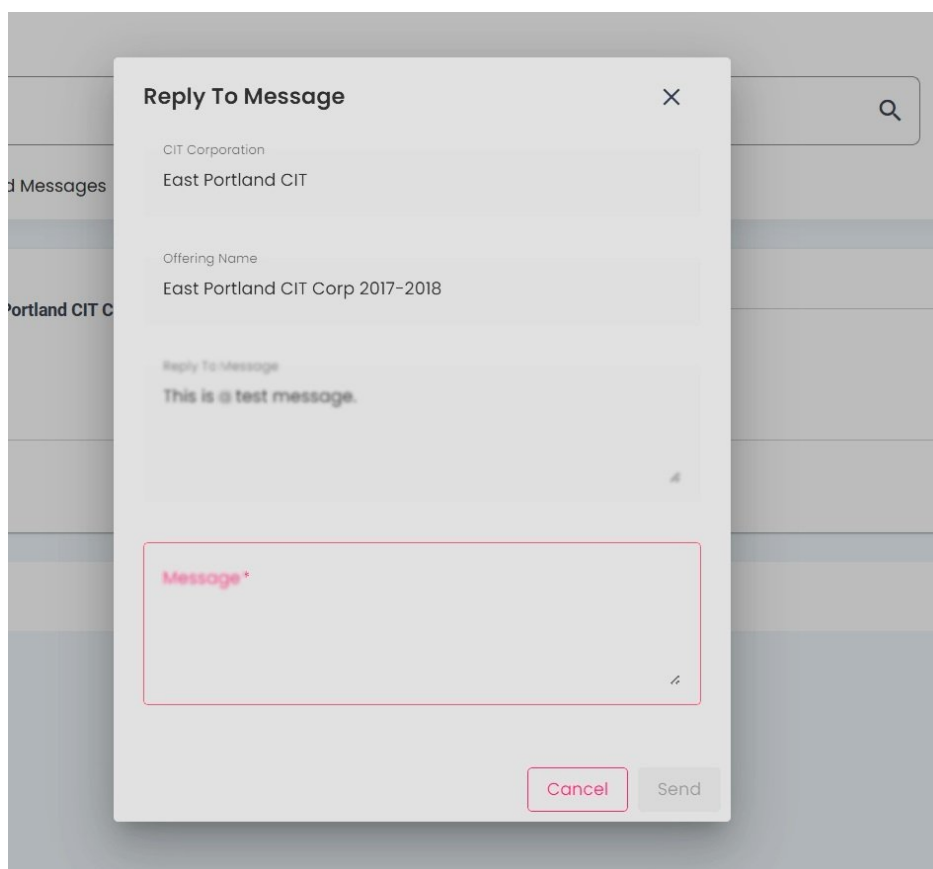


Fig. 68: Investor Portal, Messages, Reply Window

Step 3: Compose Your Reply

Enter your message content in the text area:

Step 4: Send Your Reply

Click the Send button to submit your reply:

Reply To Message X

CIT Corporation
East Portland CIT

Offering Name
East Portland CIT Corp 2017-2018

Reply To Message
This is a test message.

Message*

Cancel Send

Fig. 69: Investor Portal, Messages, Message Content Area

Step 5: View Reply Confirmation

After sending, you'll see your reply in the message thread:

Note

Replies are sent directly to the CIT Corporation that sent the original message. Response times may vary based on the corporation's communication policies.

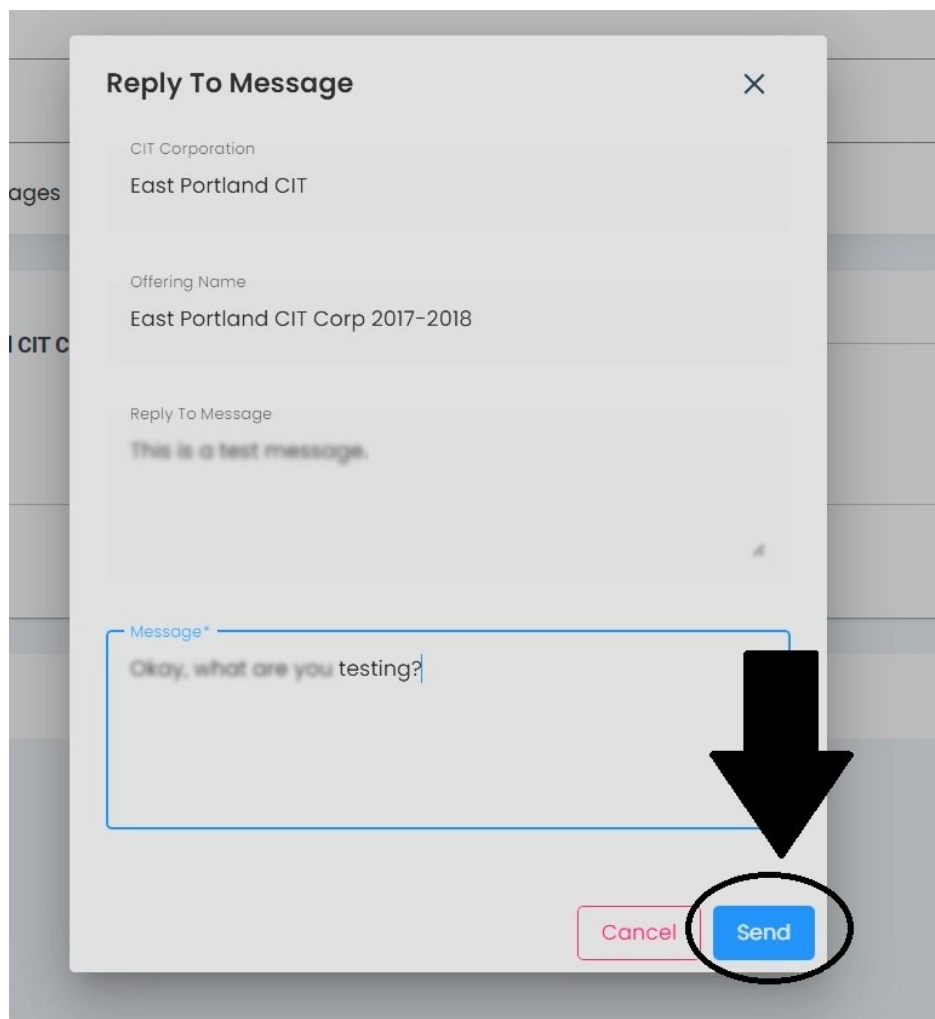


Fig. 70: Investor Portal, Messages, Send Button

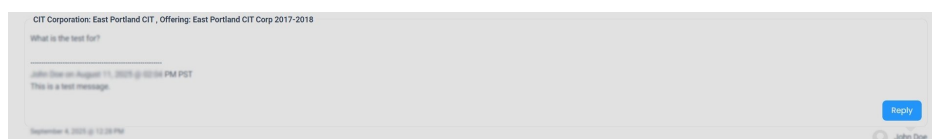


Fig. 71: Investor Portal, Messages, Reply Confirmation

VIII Change Requests

The **Change Requests** section allows you to submit and track formal requests to modify your investor information.

Table of Contents

- [Location: Change Requests](#)
- [Name Change Request List](#)
- [Columns: Name Change Request List Table](#)
- [Filtering Change Requests](#)
 - [To Filter by Status:](#)
 - [To Search for Specific Requests:](#)

VIII.1 Location: Change Requests

You can find the **Change Requests** section in the Investor Portal:

VIII.2 Name Change Request List

The **Name Change Request List** displays all submitted name change requests and their current status.

VIII.3 Columns: Name Change Request List Table

The **Columns** for the **Name Change Request List** table can be found at the top of the table:

The **Name Change Request List** table includes the following columns:

- **Current Account Name** The investor's current registered name
- **New Account Name** The requested new name for the account
- **Req. By** Person who submitted the name change request
- **Req. Date** Date when the request was submitted
- **Status** Current status of the name change request
- **Action** Available actions for this request

VIII.4 Filtering Change Requests

To Filter by Status:

1. **Select** the **Status** dropdown filter.
2. **Select** the desired status from the expanded dropdown.

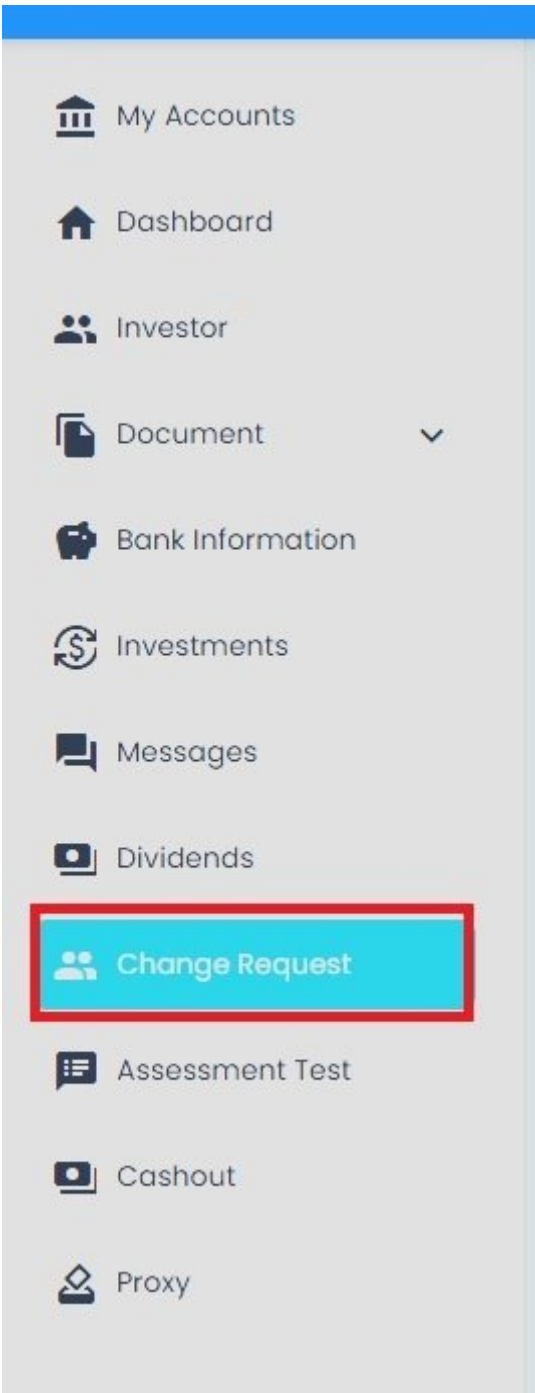


Fig. 72: Change Requests Section Location

Name Change Request List

Status: All

Search Name

Current Account Name	New Account Name	Req. By	Req. Date	Status	Action
No Record Found					

Items per page: 10 0 of 0

Fig. 73: Change Requests List Table



Name Change Request List

Status: All Search Name

Current Account Name	New Account Name	Req. By	Req. Date	Status	Action
No Record Found					

Items per page: 10 0 of 0

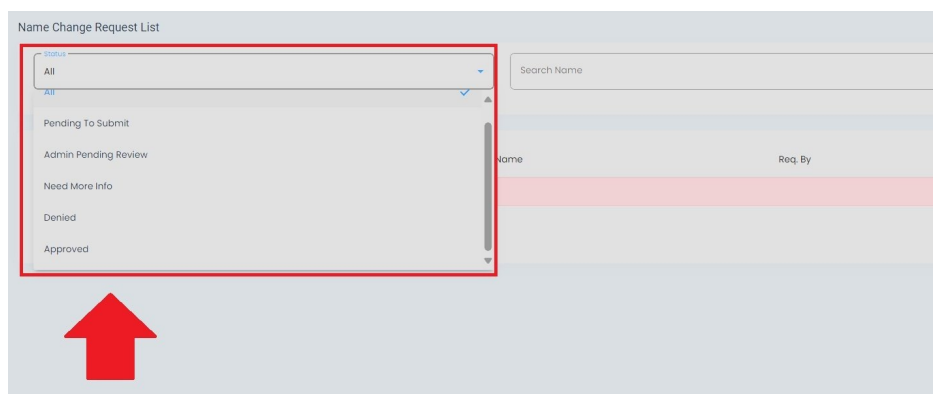
Fig. 74: Name Change Request List Table Column Headers

Name Change Request List

Status: All Search Name

Current Account Name	New Account Name	Req. By	Req. Date	Status	Action
No Record Found					

Items per page: 10 0 of 0

Fig. 75: Status Filter Dropdown Location

Name Change Request List

Status: All Search Name


Current Account Name	New Account Name	Req. By	Req. Date	Status	Action
No Record Found					

Items per page: 10 0 of 0

Fig. 76: Status Dropdown Options

To Search for Specific Requests:

1. Enter the search term in the search field.



Name Change Request List

Status: All Search Name

Current Account Name	New Account Name	Req. By	Req. Date	Status	Action
No Record Found					

Items per page: 10 0 of 0

Fig. 77: Search for Change Requests

IX Assessment Test

This is the **Assessment Test** section. It still needs to have information added to it.

X Cashout

The **Cashout** section allows you to request withdrawals from your investments.

X.1 Navigation Location

Access Cashout from the navigation menu:

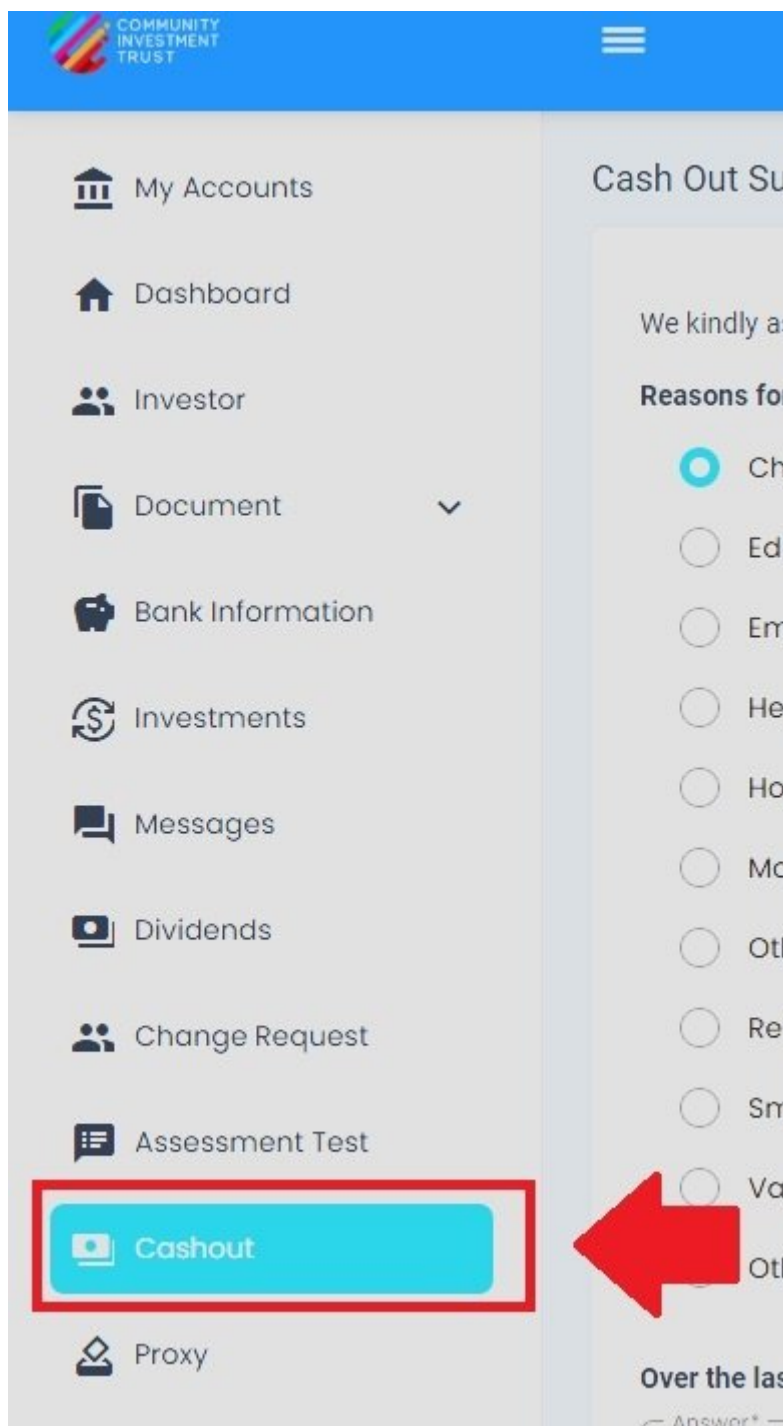


Fig. 78: Investor Portal, Cashout, Navigation Menu Location

X.2 How to Create a New Cashout Request

Follow these steps to create a new cashout request:

Step 1: Complete Cashout Survey

Fill out the cashout survey form:

Fig. 79: Cashout (Choose Payment), Step 1: Fill Out Cashout Survey

Step 2: Select Bank Information

Step 2.1: Open Bank Dropdown

Click to select bank account for funds:

Fig. 80: Cashout (Choose Payment), Step 2.1: Select Bank Information Dropdown

Add New Bank Account (Optional)

If you need to add a new bank account:

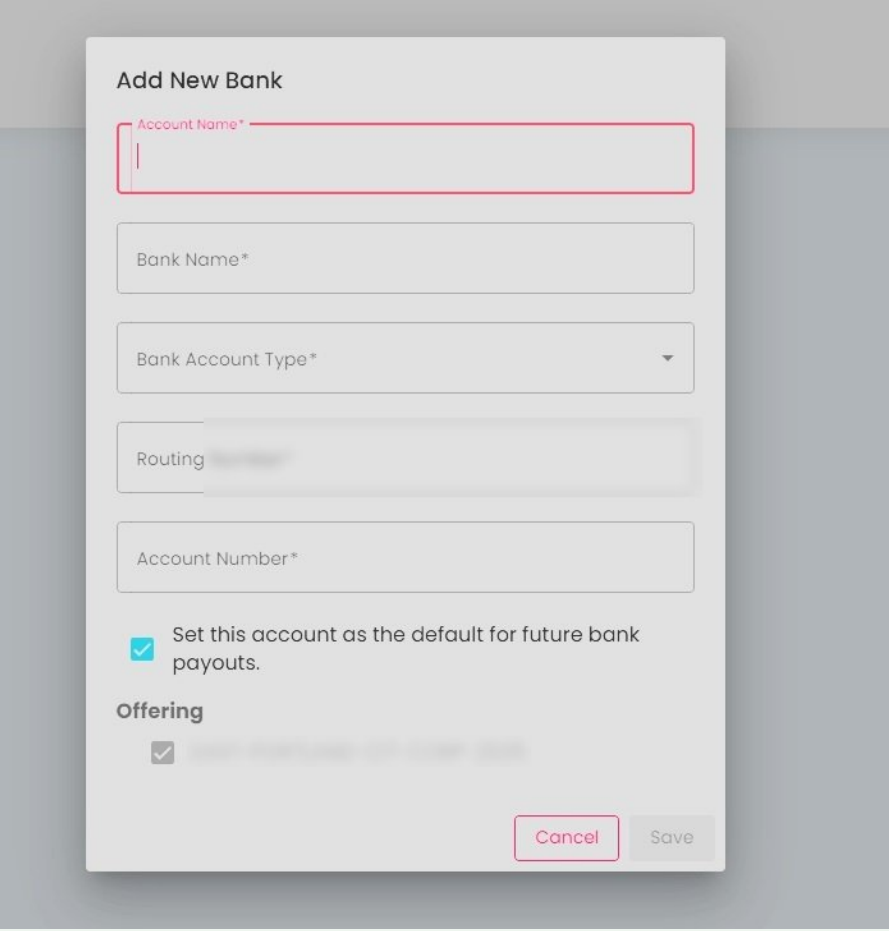
Locate Add Button

Find the **Add New Bank Account** button:

Add New Bank Account Button Location

Complete Bank Form

Fill in the bank account details:

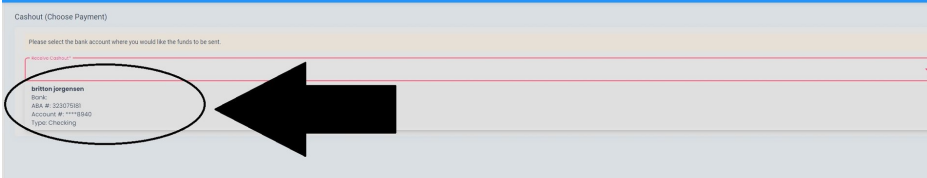


The image shows a modal form titled "Add New Bank". It contains several input fields: "Account Name*" (highlighted with a red border), "Bank Name*", "Bank Account Type*" (a dropdown menu), "Routing", and "Account Number*". Below these fields is a checkbox labeled "Set this account as the default for future bank payouts." which is checked. Under the heading "Offering", there is another checked checkbox. At the bottom right of the form are "Cancel" and "Save" buttons.

Add New Bank Account Form

Step 2.2: Select Bank from Dropdown

Choose your bank account:



The image shows a form titled "Cashout (Choose Payment)". It contains a dropdown menu with the text "Please select the bank account where you would like the funds to be sent." Below the dropdown, a list of bank accounts is displayed. One account, "britton jergensen", is circled in black, and a large black arrow points to it. The account details for "britton jergensen" are: Bank: ABA #: 221075181, Account #: ****8840, Type: Checking.

Fig. 81: Cashout (Choose Payment), Step 2.2: Select Bank from Dropdown

Step 2.3: Continue to Next Step

Click **Continue** :

Cashout (Choose Payment)

Please select the bank account where you would like the funds to be sent.

britton jorgensen
Bank #: 33070581
Account #: ****8840
Type: Checking

+ Add New Bank Account

Continue

Fig. 82: Cashout (Choose Payment), Step 2.3: Select Continue

Step 3: Review and Sign Agreements

Step 3.1: Allow Location Access

Allow location access when prompted:

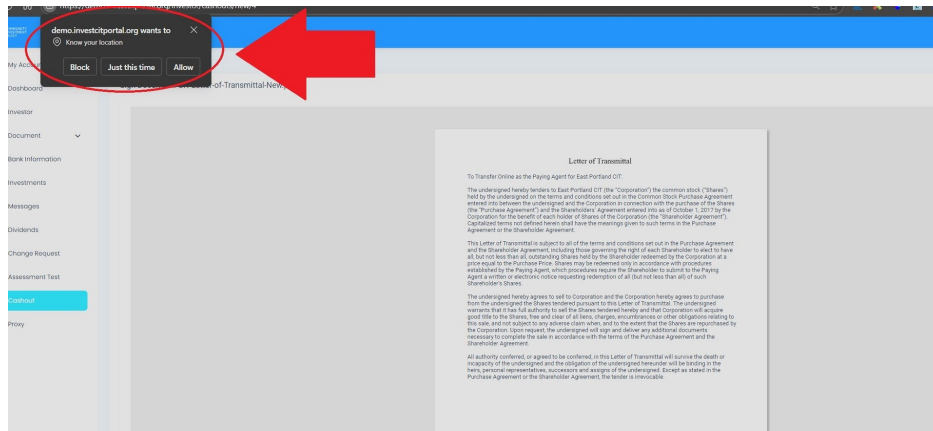


Fig. 83: Step 3.1: Allow for Location

Step 3.2: Read Agreements

Review the agreement terms and select **Next** :

East Portland CIT - Cashout

Sign Document: 887 Letter of Transmittal New.pdf

Letter of Transmittal

To Transfer Online as the Paying Agent for East Portland CIT

The undersigned hereby transfers to East Portland CIT (the "Corporation") the common stock ("Shares") held by the undersigned on the terms and conditions set out in the Common Stock Purchase Agreement entered into between the undersigned and the Corporation in connection with the purchase of the Shares (the "Purchase Agreement") and the Shareholder Agreement entered into as of October 1, 2017 by the Corporation for the benefit of each holder of Shares of the Corporation (the "Shareholder Agreement"). Capitalization terms not defined herein shall have the meanings given to such terms in the Purchase Agreement or the Shareholder Agreement.

This Letter of Transmittal is subject to all of the terms and conditions set out in the Purchase Agreement and the Shareholder Agreement, including those governing the right of each Shareholder to sell to have all, but not less than all, outstanding Shares held by the Shareholder redeemed by the Corporation at a price equal to the Purchase Price. Shares may be redeemed only in accordance with procedures established by the Paying Agent, which procedures require the Shareholder to submit to the Paying Agent a written or electronic notice requesting redemption of all (but not less than all) of such Shareholder's Shares.

The undersigned hereby agrees to sell to Corporation and the Corporation hereby agrees to purchase from the undersigned the Shares transferred pursuant to this Letter of Transmittal. The undersigned warrants that it has full authority to sell the Shares transferred hereby and that Corporation will acquire good title to the Shares. The sale and issue of the Shares, including any conditions or other obligations relating to this sale, and not subject to any adverse claim, shall, and to the extent that the Shares are repurchased by the Corporation, upon request, the undersigned will sign and deliver any additional documents necessary to complete the sale in accordance with the terms of the Purchase Agreement and the Shareholder Agreement.

All authority conferred, or agreed to be conferred, in this Letter of Transmittal will survive the death or incapacity of the undersigned and the obligation of the undersigned hereunder will be binding on the heirs, personal representatives, successors and assigns of the undersigned. Except as stated in the Purchase Agreement or the Shareholder Agreement, the transfer is irrevocable.

0 of 3 Fields Completed

Next

Fig. 84: Step 3.2: Read Agreements

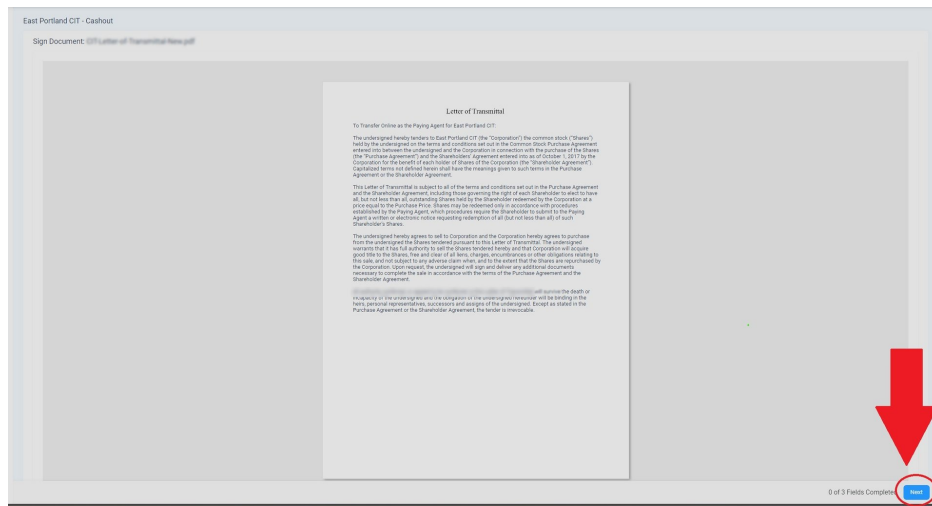


Fig. 85: Step 3.2: Select Next to View Signing Sections

Step 3.3: Select Cashout Option

Choose your desired cashout option:

Step 3.4: Start Digital Signature

Click the sign box to begin signing:

Step 4: Complete Digital Signature

Step 4.1: Choose Signature Type

Select your signature type:

Step 4.2: Fill Out Name

Enter your name:

Step 4.3: Sign Form

Complete your signature:

Step 5: Enter Registered Name

Fill out your name as registered:

Step 6: Verify All Fields Complete

Check that all fields are completed:

Step 7: Finish Process

Select **Finish** :


PART 1: NAME, ADDRESS AND OTHER CONTACT INFORMATION:

Name of Shareholder as Shares are Titled: John Doe
Mailing Address: 2431 SE 87th Ave Portland, OR 97216
Social Security No. or Taxpayer I.D. No: ***-**-9999
Telephone Number: 5035555555
Email: john.doe@tol.com

PART 2: 275.14670

PART 3: EXHIBIT A

PART 4: AMOUNT OF FUNDS TO BE CASHED OUT: 5,560.71

 CHECK ONE OF THE FOLLOWING BOXES:

☒ Cash out my shares and stop my investment with East Portland CIT.

☐ Cash out my shares and continue my investment with East Portland CIT.

Invested Amount(s) and number of shares
2018: \$1,400 - 40 shares
2019: \$1,200 - \$2,3608 shares
2022: \$900 - \$1,7859 shares
Total: \$3,500

Frank
Signature
John Doe
Name as registered
☒ **x. Sign**
Co-signatory if necessary

Name as registered
Date: 9/4/2025

cc: CIT Services, LLC

Fig. 86: Step 3.3: Select Desired Cashout Option

Step 8: Confirm Completion

Select from the information popup:

Action Complete

Your cashout request has been submitted successfully. You can track its progress in the Cashout section.

PART 1: NAME, ADDRESS AND OTHER CONTACT INFORMATION:

Name of Shareholder as Shares are Titled: John Doe

Residing Address: 101 N 10th Ave Portland, OR 97227

Social Security No. or Taxpayer I.D. No: ***-**-9999

Telephone Number: 5035555555

Email: john.doe@tol.com

PART 2: 275.14670

PART 3: EXHIBIT A

PART 4: AMOUNT OF FUNDS TO BE CASHED OUT: 5,560.71

CHECK ONE OF THE FOLLOWING BOXES:

☐ Cash out my shares and stop my investment with East Portland CIT.

☐ Cash out my shares and continue my investment with East Portland CIT.

Invested Amount(s) and number of shares

2018: \$1,400	140 shares
2019: \$1,200	82,3608 shares
2022: \$900	12,7859 shares
Total:	\$3,500

x. Sign

Signature

John Doe

Name as registered

x. Sign

Co-signatory if necessary

Name as registered

Date: 9/4/2025

cc: CIT Services, LLC

Fig. 87: Step 3.4: Select Sign Box to Start Digital Signature

The 'User Signature' dialog box has four tabs: 'Type', 'Draw', 'Upload', and 'Signatures'. The 'Type' tab is selected and highlighted with a red box. Below the tabs is a text input field labeled 'Type Your Name*' containing the text 'Frank'. Below this is a large preview area showing the word 'Frank' in a blue serif font. At the bottom left of the preview area is a green checkmark icon followed by the text 'Save Signature'. At the bottom right are two buttons: 'Cancel' (pink) and 'Sign' (blue).

Fig. 88: Step 4.1: Choose Type of Signature

This is the same 'User Signature' dialog box as in Fig. 88, but with a red oval highlighting the 'Type Your Name*' text input field which contains the name 'Frank'. The rest of the interface, including the 'Type' tab, the signature preview, and the 'Save Signature' button, remains the same.

Fig. 89: Step 4.2: Fill Out Name

Co-signatory if necessary

Registered
25

User Signature

Type Draw Upload Signatures

Type Your Name*
Frank

Frank

✓ Save Signature

Cancel Sign

000-001-139	1005	12/18/2017	Other	Stop	S
000-001-140	1000	12/18/2017	Other		Co

Fig. 90: Step 4.3: Sign Form

PART 1: NAME, ADDRESS AND OTHER CONTACT INFORMATION:

Name of Shareholder as Shares are Titled: John Doe
Mailing Address: 2431 SE 87th Ave Portland, OR 97216
Social Security No. or Taxpayer I.D. No: ***-**-9999
Telephone Number: 5035555555
Email: john.doe@tol.com

PART 2: 275.14670

PART 3: EXHIBIT A

PART 4: AMOUNT OF FUNDS TO BE CASHED OUT: 5,560.71

CHECK ONE OF THE FOLLOWING BOXES:

☒ Cash out my shares and stop my investment with East Portland CIT.
☐ Cash out my shares and continue my investment with East Portland CIT.

Invested Amount(s) and number of shares
2018: \$1,400 - 140 shares
2019: \$1,200 - 120.3608 shares
2022: \$900 - 90.7859 shares
Total: \$3,500

Frank
Signature
John Doe
Name as registered
x. Sign
Co-signatory, if necessary
Name as registered
Date: 9/4/2025

cc: CIT Services, LLC

Fig. 91: Step 5.1: Fill Out Name as Registered

CIT Investor Manual, Release 1

PART 4: AMOUNT OF FUNDS TO BE CASHED OUT: 5500.71

CHECK ONE OF THE FOLLOWING BOXES:

☒ Cash out my shares and stop my investment with East Portland CIT

☐ Cash out my shares and continue my investment with East Portland CIT.

Invested Amount(s) and number of shares
 2018 \$1,400 - 140 shares
 2019 \$1,200 - 120 shares
 2020 \$100 - 10 shares
 Total: \$3,600

Frank
 Signature
 John Doe
 Name as registered
 A. Sign
 E-signatory if necessary
 Frank
 Name as registered
 Date: 9/4/2023

cc: CIT Services, LLC

EXHIBIT A
 Holdings Statement

Certificate ID	Certificate #	Issued	Canceled	Restriction	Stop	Security Type	Shares
000001139	1005	12/18/2017		Other		Common	10
000001140	1005	12/18/2017		Other		Common	10
000001141	1006	1/23/2018		Other		Common	10
000001142	1024	2/22/2018		Other		Common	10
000001143	1035	3/22/2018		Other		Common	10
000001144	1055	5/20/2018		Other		Common	10
000001145	1081	5/20/2018		Other		Common	10
000001146	1107	6/21/2018		Other		Common	10
000001147	1138	7/30/2018		Other		Common	10
000001148	1178	9/1/2018		Other		Common	10
000001149	1199	9/27/2018		Other		Common	10
000001150	1344	10/30/2018		Other		Common	10
000001151	1392	11/14/2018		Other		Common	10
000001152	1344	12/28/2018		Other		Common	10
000002479	1471	3/7/2019		Other		Common	6.804
000002480	1503	5/9/2019		Other		Common	6.804
000002481	1631	5/9/2019		Other		Common	6.804
000002482	1775	5/9/2019		Other		Common	6.804
000002483	1775	5/26/2019		Other		Common	6.804
000002484	1804	8/12/2019		Other		Common	6.804
000002485	1804	8/12/2019		Other		Common	6.804
000002486	2115	11/1/2019		Other		Common	6.804
000002487	2179	11/1/2019		Other		Common	6.804
000002488	2205	11/1/2019		Other		Common	6.804
000002489	2320	12/18/2019		Other		Common	6.804
000002490	2441	12/18/2019		Other		Common	6.804

2 of 2 Fields Completed **Finish**

Fig. 92: Step 6.1: Check All Fields Complete

PART 4: AMOUNT OF FUNDS TO BE CASHED OUT: 5500.71

CHECK ONE OF THE FOLLOWING BOXES:

☒ Cash out my shares and stop my investment with East Portland CIT

☐ Cash out my shares and continue my investment with East Portland CIT.

Invested Amount(s) and number of shares
 2018 \$1,400 - 140 shares
 2019 \$1,200 - 120 shares
 2020 \$100 - 10 shares
 Total: \$3,600

Frank
 Signature
 John Doe
 Name as registered
 A. Sign
 E-signatory if necessary
 Frank
 Name as registered
 Date: 9/4/2023

cc: CIT Services, LLC

EXHIBIT A
 Holdings Statement

Certificate ID	Certificate #	Issued	Canceled	Restriction	Stop	Security Type	Shares
000001139	1005	12/18/2017		Other		Common	10
000001140	1005	12/18/2017		Other		Common	10
000001141	1006	1/23/2018		Other		Common	10
000001142	1024	2/22/2018		Other		Common	10
000001143	1035	3/22/2018		Other		Common	10
000001144	1055	5/20/2018		Other		Common	10
000001145	1081	5/20/2018		Other		Common	10
000001146	1107	6/21/2018		Other		Common	10
000001147	1138	7/30/2018		Other		Common	10
000001148	1178	9/1/2018		Other		Common	10
000001149	1199	9/27/2018		Other		Common	10
000001150	1344	10/30/2018		Other		Common	10
000001151	1392	11/14/2018		Other		Common	10
000001152	1344	12/28/2018		Other		Common	10
000002479	1471	3/7/2019		Other		Common	6.804
000002480	1503	5/9/2019		Other		Common	6.804
000002481	1631	5/9/2019		Other		Common	6.804
000002482	1775	5/9/2019		Other		Common	6.804
000002483	1775	5/26/2019		Other		Common	6.804
000002484	1804	8/12/2019		Other		Common	6.804
000002485	1804	8/12/2019		Other		Common	6.804
000002486	2115	11/1/2019		Other		Common	6.804
000002487	2179	11/1/2019		Other		Common	6.804
000002488	2205	11/1/2019		Other		Common	6.804
000002489	2320	12/18/2019		Other		Common	6.804
000002490	2441	12/18/2019		Other		Common	6.804

2 of 2 Fields Completed **Finish**

Fig. 93: Step 7: Select Finish

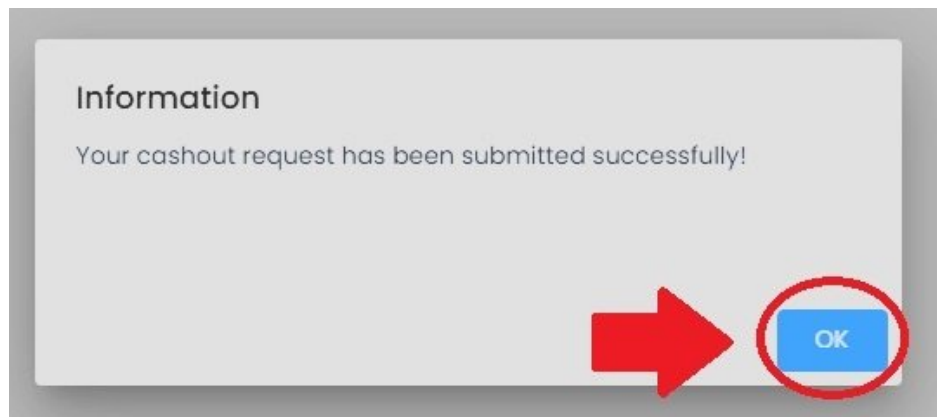


Fig. 94: Step 8: Select OK from Information Popup

XI Proxy

The **Proxy** section allows you to view and cast votes on shareholder proposals and corporate governance matters.

Table of Contents

- [Location: Proxy](#)
- [Proxy List](#)
- [Columns: Proxy List Table](#)
- [Filtering and Searching](#)
 - [To Filter by Status:](#)
 - [To Search for Specific Proxies:](#)
- [Viewing Proxy Details](#)
 - [To View Proxy Details:](#)
 - [Proxy Information Sections](#)
 - * [Description Section](#)
 - * [Quorum Status](#)
- [Casting Your Vote](#)
 - [Voting Options](#)
 - [To Cast Your Vote:](#)
 - [Voter Submission Information](#)
- [Navigation](#)
- [Viewing Vote Details](#)

XI.1 Location: Proxy

You can find the **Proxy** section in the Investor Portal:

XI.2 Proxy List

The **Proxy List** displays all available proxy voting opportunities and their current status.

XI.3 Columns: Proxy List Table

The **Columns** for the **Proxy List** table can be found at the top of the table:

The **Proxy List** table includes the following columns:

- **Proxy Id** Unique identifier for the proxy voting event
- **CIT Corporation** Corporation associated with this proxy vote

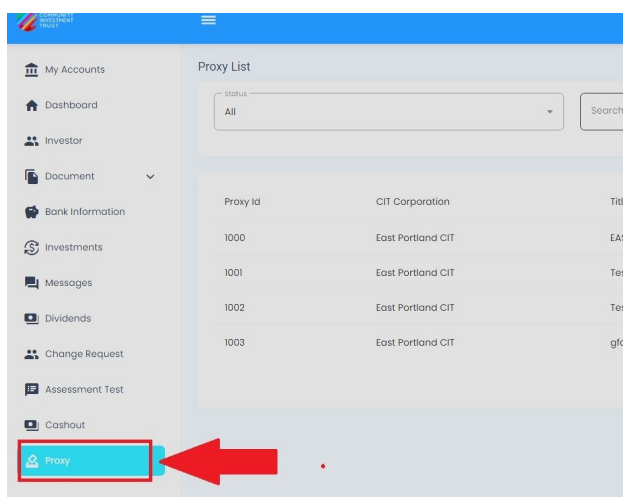


Fig. 95: Proxy Section Location

The screenshot shows the 'Proxy List' homepage. It features a status dropdown set to 'All' and a search bar. Below is a table with the following data:

Proxy Id	CIT Corporation	Title	Shares	Vote Status	Status	Action
1000	East Portland CIT	EAST PORTLAND CIT ANNUAL MEETING 2022	222,360,980	Voted	CLOSED	
1001	East Portland CIT	Test	275,146,770	Not Voted	CLOSED	
1002	East Portland CIT	Test dlog	275,146,770	Not Voted	CLOSED	
1003	East Portland CIT	gld	275,146,770	Not Voted	CLOSED	

At the bottom right, there is a pagination control showing 'Items per page: 10' and '1 - 4 of 4'.

Fig. 96: Proxy List Homepage

The screenshot shows the 'Proxy List' table with the header row highlighted by a red border. The headers are:

Proxy Id	CIT Corporation	Title	Shares	Vote Status	Status	Action
1000	East Portland CIT	EAST PORTLAND CIT ANNUAL MEETING 2022	222,360,980	Voted	CLOSED	
1001	East Portland CIT	Test	275,146,770	Not Voted	CLOSED	
1002	East Portland CIT	Test dlog	275,146,770	Not Voted	CLOSED	
1003	East Portland CIT	gld	275,146,770	Not Voted	CLOSED	

At the bottom right, there is a pagination control showing 'Items per page: 10' and '1 - 4 of 4'.

Fig. 97: Proxy List Table Column Headers

- **Title** Title or description of the proxy voting matter
- **Shares** Number of shares you hold that are eligible to vote
- **Vote Status** Status of your vote (Voted or Not Voted)
- **Status** Overall status of the proxy event (Open or Closed)
- **Action** Available actions for viewing details or casting your vote

XI.4 Filtering and Searching

To Filter by Status:

1. Select the **Status** dropdown filter.
2. Select the desired status from the expanded dropdown.

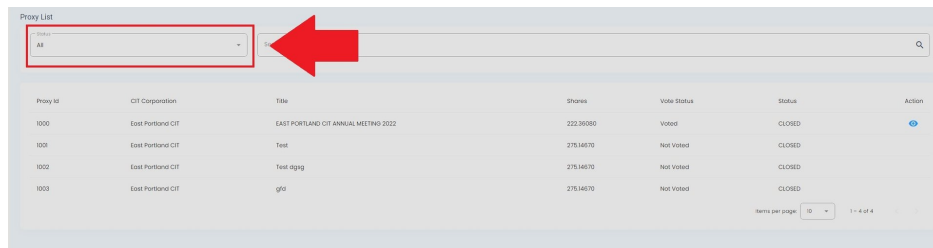


Fig. 98: Status Filter Dropdown Location

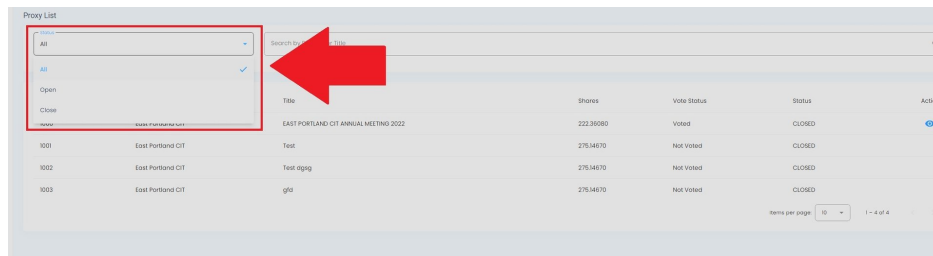


Fig. 99: Status Dropdown Options

To Search for Specific Proxies:

1. Enter the search term in the search field.

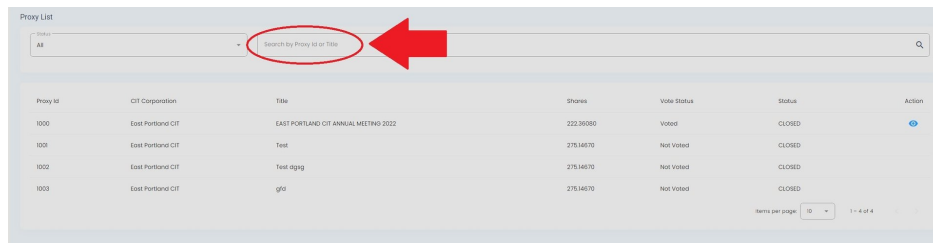


Fig. 100: Search for Proxy Votes

XI.5 Viewing Proxy Details

To View Proxy Details:

1. Select the View Details link in the proxy row.



Fig. 101: View Details Link Location

2. The proxy details screen displays comprehensive voting information.

Proxy Voting Details - John Doe

Proxy ID 1000 Title EAST PORTLAND CIT ANNUAL MEETING 2022 Quorum 50% Quorum Is Not Met (%) Record Date 02/21/2022 Mailing Date 02/25/2022 Meeting Date & Time 03/18/2022 @ 11:00 AM Voting Close Date & Time 03/18/2022 @ 11:00 AM Completed Date 03/21/2022 Description The shareholder(s) hereby appoint(s) the Board of Directors of EAST PORTLAND CIT CORP as proxies, each with the power to appoint his substitute, and hereby authorizes them to represent and to vote, as designated on the reverse side of this ballot, all the shares of Common Stock of EAST PORTLAND CIT CORP that the shareholder(s) is/are entitled to vote at the Annual Meeting of shareholder(s) to be held at 11:00 AM, (PST) on 3/18/2022, at 1427 SE 22nd Ave. Portland, OR 97233, and virtually via Zoom at https://us02web.zoom.us/j/85655560894 , and any adjournment or postponement thereof. This Proxy will be voted as directed. If no direction is indicated, it will be voted FOR the proposal made by the EAST PORTLAND CIT CORP Board of Directors. The Proxy Statement will be web hosted at https://transferonline.com/proxydocs/cit/ and available to view when you log in to vote.	Status Closed CIT Corporation East Portland CIT Voting Shares 222,36680 Shareholder John Doe Email john.doe@tol.com
--	---

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

☒ **FOR (Recommended)**
☐ **AGAINST**
☐ **ABSTAIN**

[BACK](#)

Fig. 102: Proxy Voting Details Overview

Proxy Information Sections

The proxy details page includes:

Proxy Voting Details - John Doe

Proxy ID 1000 Title EAST PORTLAND CIT ANNUAL MEETING 2022 Quorum 50% Quorum Is Not Met (%) Record Date 02/21/2022 Mailing Date 02/25/2022 Meeting Date & Time 03/18/2022 @ 11:00 AM Voting Close Date & Time 03/18/2022 @ 11:00 AM Completed Date 03/21/2022 Description The shareholder(s) hereby appoint(s) the Board of Directors of EAST PORTLAND CIT CORP as proxies, each with the power to appoint his substitute, and hereby authorizes them to represent and to vote, as designated on the reverse side of this ballot, all the shares of Common Stock of EAST PORTLAND CIT CORP that the shareholder(s) is/are entitled to vote at the Annual Meeting of shareholder(s) to be held at 11:00 AM, (PST) on 3/18/2022, at 1427 SE 22nd Ave. Portland, OR 97233, and virtually via Zoom at https://us02web.zoom.us/j/85655560894 , and any adjournment or postponement thereof. This Proxy will be voted as directed. If no direction is indicated, it will be voted FOR the proposal made by the EAST PORTLAND CIT CORP Board of Directors. The Proxy Statement will be web hosted at https://transferonline.com/proxydocs/cit/ and available to view when you log in to vote.	Status Closed CIT Corporation East Portland CIT Voting Shares 222,36680 Shareholder John Doe Email john.doe@tol.com
--	---

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

☒ **FOR (Recommended)**
☐ **AGAINST**
☐ **ABSTAIN**

[BACK](#)

Fig. 103: Complete Proxy Details View

Description Section

Quorum Status

Note

The **Quorum** field indicates whether sufficient shareholder participation has been achieved. A red “Quorum Is Not Met (%)” badge appears when the required voting threshold has not been reached.

XI.6 Casting Your Vote

Voting Options

The voting interface presents clear options for each proposal:

Proxy Voting Details - John Doe

Proxy ID: 1000
Title: EAST PORTLAND CIT ANNUAL MEETING 2022
Quorum: 50% (Quorum is met and OK)
Record Date: 02/21/2022
Mailing Date: 02/25/2022
Meeting Date & Time: 03/18/2022 @ 11:00 AM
Voting Close Date & Time: 03/18/2022 @ 11:00 AM
Completed Date: 03/21/2022

Status: Closed
CIT Corporation
East Portland CIT
Voting Shares: 222,30000
Shareholder: John Doe
Email: john.doe@gmail.com

Description
The shareholder(s) hereby appoints the Board of Directors of EAST PORTLAND CIT CORP as proxies, each with the power to appoint his substitute, and hereby authorizes them to represent and to vote, as designated on the reverse side of this ballot, all the shares of Common Stock of EAST PORTLAND CIT CORP that the shareholder(s) is/are entitled to vote at the Annual Meeting of shareholders to be held at 11:00 AM, PST on 03/18/2022, at 1407 SE 22nd Ave, Portland, OR 97233, and virtually via Zoom at https://us02zoom.us/j/8565506084, and any adjournment or postponement thereof. This Proxy will be voted as directed. If no direction is indicated, it will be voted FOR the proposal made by the EAST PORTLAND CIT CORP Board of Directors. The Proxy Statement will be web hosted at https://shareline.com/proxy/vot and available to view when you log in to vote.

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

FOR (Recommended) ABANDON

BACK

Fig. 104: Proxy Description and Statement

Proxy Voting Details - John Doe

Proxy ID: 1000
Title: EAST PORTLAND CIT ANNUAL MEETING 2022
Quorum: 50% (Quorum is met and OK)
Record Date: 02/21/2022
Mailing Date: 02/25/2022
Meeting Date & Time: 03/18/2022 @ 11:00 AM
Voting Close Date & Time: 03/18/2022 @ 11:00 AM
Completed Date: 03/21/2022

Status: Closed
CIT Corporation
East Portland CIT
Voting Shares: 222,30000
Shareholder: John Doe
Email: john.doe@gmail.com

Description
The shareholder(s) hereby appoints the Board of Directors of EAST PORTLAND CIT CORP as proxies, each with the power to appoint his substitute, and hereby authorizes them to represent and to vote, as designated on the reverse side of this ballot, all the shares of Common Stock of EAST PORTLAND CIT CORP that the shareholder(s) is/are entitled to vote at the Annual Meeting of shareholders to be held at 11:00 AM, PST on 03/18/2022, at 1407 SE 22nd Ave, Portland, OR 97233, and virtually via Zoom at https://us02zoom.us/j/8565506084, and any adjournment or postponement thereof. This Proxy will be voted as directed. If no direction is indicated, it will be voted FOR the proposal made by the EAST PORTLAND CIT CORP Board of Directors. The Proxy Statement will be web hosted at https://shareline.com/proxy/vot and available to view when you log in to vote.

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

FOR (Recommended) ABANDON

BACK

Fig. 105: Quorum Status Indicator

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

FOR (Recommended) ABANDON

Fig. 106: Voting Options with Recommended Choice

Recommended Options

Proxy Voting Details - John Doe

Proxy ID: 1000
Title: EAST PORTLAND CIT ANNUAL MEETING 2022
Quorum: 50% (Quorum is met and OK)
Record Date: 02/21/2022
Mailing Date: 02/25/2022
Meeting Date & Time: 03/18/2022 @ 11:00 AM
Voting Close Date & Time: 03/18/2022 @ 11:00 AM
Completed Date: 03/21/2022

Status: Closed
CIT Corporation
East Portland CIT
Voting Shares: 222,30000
Shareholder: John Doe
Email: john.doe@gmail.com

Description
The shareholder(s) hereby appoints the Board of Directors of EAST PORTLAND CIT CORP as proxies, each with the power to appoint his substitute, and hereby authorizes them to represent and to vote, as designated on the reverse side of this ballot, all the shares of Common Stock of EAST PORTLAND CIT CORP that the shareholder(s) is/are entitled to vote at the Annual Meeting of shareholders to be held at 11:00 AM, PST on 03/18/2022, at 1407 SE 22nd Ave, Portland, OR 97233, and virtually via Zoom at https://us02zoom.us/j/8565506084, and any adjournment or postponement thereof. This Proxy will be voted as directed. If no direction is indicated, it will be voted FOR the proposal made by the EAST PORTLAND CIT CORP Board of Directors. The Proxy Statement will be web hosted at https://shareline.com/proxy/vot and available to view when you log in to vote.

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

FOR (Recommended) ABANDON

BACK

Recommended Option Indicator

The **Recommended** badge indicates the board's suggested voting position on each proposal.

To Cast Your Vote:

1. **Select** your voting choice for each proposal.

Proxy Voting Details - John Doe

Proxy ID
1000

Title
EAST PORTLAND CIT ANNUAL MEETING 2022

Overview
For **Against** **Abstain** **Not Voted**
Record Date
02/21/2022
Meeting Date
03/20/2022
Meeting Date & Time
03/16/2022 @ 11:00 AM
Voting Close Date & Time
03/16/2022 @ 11:00 AM
Completed Date
03/21/2022

Status
Closed
CIT Corporation
East Portland CIT
Voting Shares
222,30880
Shareholder
John Doe
Email
john.doe@cit.com

Description
The shareholder(s) hereby appoint(s) the Board of Directors of EAST PORTLAND CIT CORP. as proxies, each with the power to appoint his substitute, and hereby authorizes them to represent and to vote, as designated on the reverse side of this ballot, all the shares of Common Stock of EAST PORTLAND CIT CORP. that the shareholder(s) is/are entitled to vote at the Annual Meeting of shareholders to be held at 11:00 AM, (PST) on 3/16/2022, at 1427 SE 22nd Ave, Portland, OR 97232, and virtually via Zoom at <https://us02web.zoom.us/j/8565558084>, and any adjournment or postponement thereof. This Proxy will be voted as directed. If no direction is indicated, it will be voted FOR the proposal made by the EAST PORTLAND CIT CORP. Board of Directors. The Proxy Statement will be web hosted at <https://transferonline.com/proxy/cit/> and available to view when you log in to vote.

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

FOR (Recommended) **AGAINST** **ABSTAIN**

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Back

Fig. 107: Vote Selection Example

2. Review your selections and **Submit** your votes.

Voter Submission Information

After voting, the submission details are recorded:

Proxy Voting Details - John Doe

Proxy ID
1000

Title
EAST PORTLAND CIT ANNUAL MEETING 2022

Overview
For **Against** **Abstain** **Not Voted**
Record Date
02/21/2022
Meeting Date
03/20/2022
Meeting Date & Time
03/16/2022 @ 11:00 AM
Voting Close Date & Time
03/16/2022 @ 11:00 AM
Completed Date
03/21/2022

Status
Closed
CIT Corporation
East Portland CIT
Voting Shares
222,30880
Shareholder
John Doe
Email
john.doe@cit.com

Description
The shareholder(s) hereby appoint(s) the Board of Directors of EAST PORTLAND CIT CORP. as proxies, each with the power to appoint his substitute, and hereby authorizes them to represent and to vote, as designated on the reverse side of this ballot, all the shares of Common Stock of EAST PORTLAND CIT CORP. that the shareholder(s) is/are entitled to vote at the Annual Meeting of shareholders to be held at 11:00 AM, (PST) on 3/16/2022, at 1427 SE 22nd Ave, Portland, OR 97232, and virtually via Zoom at <https://us02web.zoom.us/j/8565558084>, and any adjournment or postponement thereof. This Proxy will be voted as directed. If no direction is indicated, it will be voted FOR the proposal made by the EAST PORTLAND CIT CORP. Board of Directors. The Proxy Statement will be web hosted at <https://transferonline.com/proxy/cit/> and available to view when you log in to vote.

Proposals

1

Amend East Portland CIT Corporation's Shareholder Agreement.

FOR (Recommended) **AGAINST** **ABSTAIN**

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Fig. 108: Voter Submission Information

XI.7 Navigation

To return to the proxy list:

Select the **Back** button to return to the main proxy list.

XI.8 Viewing Vote Details

To review your submitted votes:

Select the **View Vote Details** link to review your voting history and selections.



Fig. 109: Back Button Location

Fig. 110: View Vote Details Link

IV

Other Manuals

- [Community Investment Trust \(CIT\) Documentation for Enterprise Users](#) For enterprise administrators and staff
- [Community Investment Trust \(CIT\) Documentation for Community Users](#) For community organization users
- [Community Investment Trust \(CIT\) Documentation for CIT Corporation Users](#) For CIT Corporation users