New Investor Portal

FREQUENTLY ASKED QUESTIONS

Please reach out to coordinator@iroquoisvalleyfarms.com if you need assistance with the new portal.

HOW TO REGISTER FOR THE NEW PORTAL	
	• Open email titled "Iroquois Valley Portal Registration" ○ Please contact coordinator@iroquoisvalleyfarms.com if you need another email invitation
	• Click the blue text "Click here to register"
	• Enter the password you would like to use, confirm the password, then click "Register"

HOW TO LOG IN (after you have registered)	
	• Go to the login page
	• Enter your email and password, then click "Log in"
Additional steps if you have *already* enabled two-factor authentication	
	• Check your phone or email for the verification code from no-reply@yardi.com
	• Insert the 7-digit verification code in the two-factor authentication box, then click "Verify and Log In"

HOW TO SIGN UP FOR TWO-FACTOR AUTHENTICATION	
Note: If you would like to increase security and/or make edits to payment information, you will need to enable two-factor authentication (2FA)	
	• Once you log in, click your initials in the top right corner, then click "My Profile"
	• Click the green "Turn On (Recommended)" button ○ Note: you must have a phone number listed in the "Contact Info" section and a member of Iroquois Valley's Investor Relations team must approve the phone number before you can enable 2FA • Choose your Preferred Second Factor method ○ Email is strongly recommended ○ Note: If you choose Text or Phone Call, you will receive a text prompting you to download the app - this is not necessary. You can still select this option without downloading the app.
	• Close the tab and log back in • After entering your login information, you will receive an email (or text or phone call, depending on the preferred second factor you selected) with a 7-digit code

	• Enter the code provided, then click "Verify & Login"
	• You have successfully enabled two-factor authentication and you are now able to edit Payment Info

HOW TO EDIT CONTACT INFORMATION, PASSWORD, AND/OR EMAIL	
	• Click your initials in the top right corner, then click "My Profile"
	• Change contact information, password, and/or email and click "Save"
HOW TO CHANGE PAYMENT INFORMATION	
Note: You may only change payment information *if* you sign up for two-factor authentication (see above)	
	• From "My Profile", click "Payment Info"
	• Choose the investor entity you would like to edit (if applicable), and click the pencil icon to the right of the investor entity name to edit
	• Edit and review Investor Entity Information, Payee Record, and Payee Bank Information accordingly, then click "Save"

HOW TO VIEW WHO HAS ACCESS TO MY PORTAL	
	• Click your initials in the top right corner
	• Click "My Profile"
	• Click "User Access" and view "User" list
HOW TO ADD AND DELETE USER ACCESS	
	• To delete a user, find the user you would like to delete under "User" and click the red trash can icon under "Remove User" ○ Await confirmation of Iroquois Valley team approval
	• Portal users are not able to add users directly to their portal. Email coordinator@iroquoisvalleyfarms.com to request a new contact/user to be added to your portal

HOW TO VIEW MY INVESTMENTS	
	• Log in to the investor portal
	• Click the "Portfolio" tab on the top blue bar
	• *Optional* Use the filters on the top white bar to sort by investor, investor entity, investment and/or "as of month" ○ To activate filters, click the "Search" button ○ To clear filters, click "Clear" to the right of the Search and Save buttons
	• Scroll down to view investment information
HOW TO VIEW MY DISTRIBUTIONS AND INVESTMENT HISTORY	
	• Click the "Transactions" tab on the top blue bar

- *Optional* Use the filters on the top white bar to sort by investor, investor entity, investment, transaction type and/or date
    - To activate filters, click the "Search" button
    - To clear filters, click "Clear" to the right of the Search and Save buttons
- Note that *historical* distributions will be listed as "Contributions" under Transaction Type

HOW TO VIEW MY DOCUMENTS

- Click "Documents" on the top blue bar
- *Optional* Use the filters on the top white bar to sort documents by investor, investor entity, investment and/or date
    - To activate filters, click the "Search" button
    - To clear filters, click "Clear" to the right of the Search and Save buttons
- Click the document name in blue text to view specific documents
- Select the box to the right of the document and click "Download" to download specific documents

HOW TO INVEST

- Click the "Investment Opportunities" tab on the top blue bar
- Select the opportunity in which you would like to invest
    - Note that the REIT Equity Shares are available to accredited and non-accredited investors, and the Rooted in Regeneration Notes are available only to accredited investors. For a general definition of accredited investor, please see: Accredited Investor.
- Review the Summary tab to learn more about the investment opportunity, specifically the offering document.
- Click "Documents" on the left bar to review the associated documents
- From the Summary tab, click the green "Begin Subscription Agreement" button in the top left

Step 1. ENTER SUBSCRIPTION INFORMATION

- If you are **investing using a pre-existing investor entity**, choose the entity by clicking the blue "Select" button under the column titled Subscribe
- If you are **investing using a new investor entity**, click the blue "Add New" button under the column titled Subscribe
    - Enter Investor Entity Information and click "Save"

Step 2. ENTER COMMITMENT AMOUNT

- Enter desired investment amount (please note the investment minimum when reviewing the investment opportunity information)
- Click "Save"

Step 3. ENTER PAYMENT INFORMATION

- If this is an existing investor entity, please review and edit, if necessary, the Payee Record and Payee Bank Information
- If this is a new investor entity, please complete the Payee Record and Payee Bank Information
- NOTE: If you would like to **enroll in the Dividend Reinvestment Plan** (DRIP), choose "Check" as Payment Method and identify that you would like to participate in the DRIP on the subscription agreement (Step 4)

	Step 4. SIGN SUBSCRIPTION AGREEMENT • Click the blue "View and Sign Document Electronically" button • Read and complete the subscription agreement ○ Red box = required field • To save and complete at a later date, click "Save Changes" • Once complete, click "Submit Document" • Await email confirmation from Iroquois Valley
	• Click "Documents" on the left bar of the Investment Opportunity tab to view Iroquois Valley's wire instructions

HOW TO SECURELY UPLOAD A DOCUMENT	
	• Click the "Upload Documents" tab on the top blue bar
	• Select the Investor in the drop-down menu
	• Drag and drop the file or select "Choose Files" to upload the file(s)
	• Click the green "Upload all" button
	• Select "Upload History" on the left bar to see your upload history and confirm the upload status

HOW TO VIEW WHICH SHARES ARE ELIGIBLE FOR REDEMPTION	
	• Log in to the investor portal
	• Click the "Portfolio" tab on the top blue bar
	• Scroll down to find the column "Redeemable Shares". These values represent the number of shares eligible for redemption
HOW TO REQUEST A REDEMPTION	
	• Email coordinator@iroquoisvalleyfarms.com to request the Request for Redemption form and Redemption Program
	• Complete the Request for Redemption form and follow the instructions on the form to submit
	• Await confirmation of receipt and next steps from Investor Relations Team

HOW TO VIEW THE MATURITY DATE OF MY NOTE INVESTMENT(S)	
	• The new investor portal does not allow for display of note maturity dates. The maturity date for each note investment can be found in the subscription agreement.
	• To view subscription agreements, click the "Documents" tab on the top blue bar and filter accordingly, if desired.

HOW TO ENROLL IN THE DIVIDEND REINVESTMENT PLAN	
	• Log in to the investor portal
	• Click the "Home" tab on the top blue bar

	• On the right side, you will see “Frequently Used Documents”. Click the download icon to the right of the document titled “REIT DRIP Enrollment Form”
	    ○ Note: If no documents appear under “Frequently Used Documents'', refresh the page several times until the list of documents appears
	    ○ Select “View All” to expand the Documents list

	• Open the document, review the enrollment instructions and agreement, then complete the signature pages
	• Submit the completed and signed Enrollment Agreement to IQVF via the methods listed on page 1 of the document
	• Await confirmation from IQVF Investor Relations team
HOW TO UNENROLL IN THE DIVIDEND REINVESTMENT PLAN	
	• Log in to the investor portal
	• Click the “Home” tab on the top blue bar

	• On the right side, you will see “Frequently Used Documents''. Click the download icon to the right of the document titled “REIT DRIP Unenrollment Form”
	    ○ Note: If no documents appear under “Frequently Used Documents'', refresh the page several times until the list of documents appears
	    ○ Select “View All” to expand the Documents list

	• Open, complete, and sign the document
	• Securely submit the completed and signed Unenrollment Form or email to coordinator@iroquoisvalleyfarms.com
	• Await confirmation from IQVF Investor Relations team
WHERE TO VIEW DRIP ENROLLMENT STATUS	
	• Once you log in, click your initials in the top right corner, then click “My Profile”
	• Click “Payment Info”
	• In the farthest right column titled “Payee Bank Info”, you will see “DRIP Enrolled” in the Reference field. ○ Note: Disregard the Payment Method: Check. If the Reference field reads “DRIP Enrolled”, you will receive dividends as reinvested shares

HOW TO RE-REGISTER OR UPDATE THE LEGAL NAME OF MY INVESTMENT	
For example, “I recently opened a trust and would like to move my personal investment into my trust. How do I update the legal name of my investment?”	
	• Log in to the investor portal
	• Click the “Home” tab on the top blue bar

	• On the right side, you will see “Frequently Used Documents''. Click the download icon to the right of the document titled “Transfer Form”
	    ○ Note: If no documents appear under “Frequently Used Documents'', refresh the page several times until the list of documents appears
	    ○ Select “View All” to expand the Documents list

	• Complete and sign the "Notice of Transfer of Investment" form
	• Submit the completed and signed form to IQVF via the methods listed on page 1
	• Await confirmation and documentation from IQVF Investor Relations team