



LEGACY
WEALTH MANAGEMENT

AS OF:

SPONSOR OVERVIEW

FUND OVERVIEW

LWM COMMENTARY

FUND TERMS

Minimum
RIA Gross Up
Close Date
Investor
Preferred Rate
Target Total Ret.
Target Dist.
Current Dist.
Dist. Frequency
DRIP Available
Tax Efficiency ^(Approx.)
Anticipated Lock
Redemption Freq.
Exit
Tax Form
UBTI
401k Friendly
Fee Structure
Catch Up
Fund Management Fee
Marketing Fee
Managing B/D Fee
Wholesaling Commissions
O&O (Approximate)
Acquisition Fee
Asset Management Fee
Operator Management Fee
Development Fee
Disposition Fee

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