

# ACCREDITED INVESTOR VERIFICATION GUIDE

www.stadiacapitalgroup.com | 1-800-893-6184 (inside the U.S.)

\* We only need your name and values on these documents.

Sensitive information may be omitted or redacted, including social security numbers, account numbers, etc.

## Please return your document(s) using any method below:

#### 1 Net Worth Method \*

Used for individuals whose net worth, or joint net worth with his or herspouse, exceeds \$1 million, excluding the value of his or her primary residence. The principal value of your Stadia Capital Group investment(s) can be included in your valuation. Examples of documents that could be used for this method are:

- Bank, Brokerage, &/or Retirement Account Statement(s)
- Deeds or Other Real Estate Holdings Evidence
- Value of Private Holdings
- Proof of Vehicle, Vessel, &/or Aircraft Ownership

#### 2 Income Method \*

Used for individuals who had an income of more than \$200K in each of the two most recent years, or joint income with his or her spouse of more than \$300K in each of those years, and has a reasonable expectation of reaching the same income level in the current year. Examples of documents that could be used for this method are:

- IRS form 1040 for the previous two years
- 1099 Income
- W-2

### 3 Knowledgeable Third-Party Verification Method

For individuals who use a knowledgeable third-party (registered broker-dealer, investment advisor, attorney, or CPA) to verify the requirements as an accredited investor. Please submit the *ACCREDITED INVESTOR THIRD-PARTY VERIFICATION* form.