

## A Better Way for REIT Issuers

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Eliminate direct registered shareholder costs while maintaining direct investor communications and shareholder loyalty with the Folio Shareholder Platform (FSP).

The FSP is a streamlined and extremely cost-effective way to support your direct registered shareholders.

The FSP offers issuers an online investor servicing platform with no direct costs and paperless shareholder interactions. The platform also offers shareholders added features, flexibility and cost savings not found on Transfer Agent platforms.

“Until now, the only way non-publicly tradable REITs could support their shareholders was with expensive, inflexible Transfer Agent platforms that cost issuers like us millions of dollars. Folio changed this.”

— Bobby Bowers, CFO  
Piedmont Office Realty Trust

## The Folio Shareholder Platform (FSP)

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### Better For Issuers:

#### Eliminate registered shareholder costs

- Convert Transfer Agent registered shareholders to the FSP with a single mailing
- No ongoing shareholder platform costs or commitments for issuers
- Save millions of dollars each year vs. typical costs

#### Paperless investor communications

- Electronic proxy voting with online statement, annual report and other document delivery
- Low, standard electronic distribution fees
- Issuers can send messages directly to investors using the Folio electronic message center

### Better For Shareholders:

#### Responsive customer service

- US-based call center available 7 days a week (except holidays) via phone, email or online chat
- Financial Advisors can also access their clients' accounts online

#### Low cost

- Support for non-publicly tradable securities at market leading rates
- Low cost purchase and sale of whole or fractional shares of U.S. listed securities
- Low account fees, plus free dividend reinvestment for listed, registered shares

#### Easy to use online platform

- Successfully used by investors for a decade
- Support for taxable and retirement accounts

# Inside the Folio Shareholder Platform

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## Low-Cost Platform

No hidden costs. How do we do it? We offer the FSP at a low cost to you and your shareholders through the cost-savings we achieve with our patented processes and technology on our fully online platform. Designed for long-term investors, our online platform offers issuers and shareholders flexibility and cost savings never before seen in the industry.

## Streamlined Conversion

Our experts will guide you through the conversion process. We have standard templates for customer communications, agreements, and schedules. The process can typically be completed within six months, with a securities hand-off on a Friday and customer access on the following Monday morning. In addition, conversion costs can be kept low with consolidated investor notification packages and streamlined transfer procedures.

## About Folio

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Founded in 1999 by Steven Wallman, a former Commissioner of the U.S. Securities and Exchange Commission, Folio has been a clearing firm and a direct member of The Depository Trust and Clearing Corporation since 2001. Today, Folio provides accounts, asset custody and services to investment advisors, broker-dealers and self-directed investors. Each and every day, Folio strives to leverage new technology to bring new investing capabilities to market while also reducing investing costs, all to help transform the way people invest.

To connect to the Folio Shareholder Platform, call us today at  
**1-888-485-3456** or **[info@folioinstitutional.com](mailto:info@folioinstitutional.com)**.