SHOPOFF | REALTY INVESTMENTS

Transforming Opportunity into Value

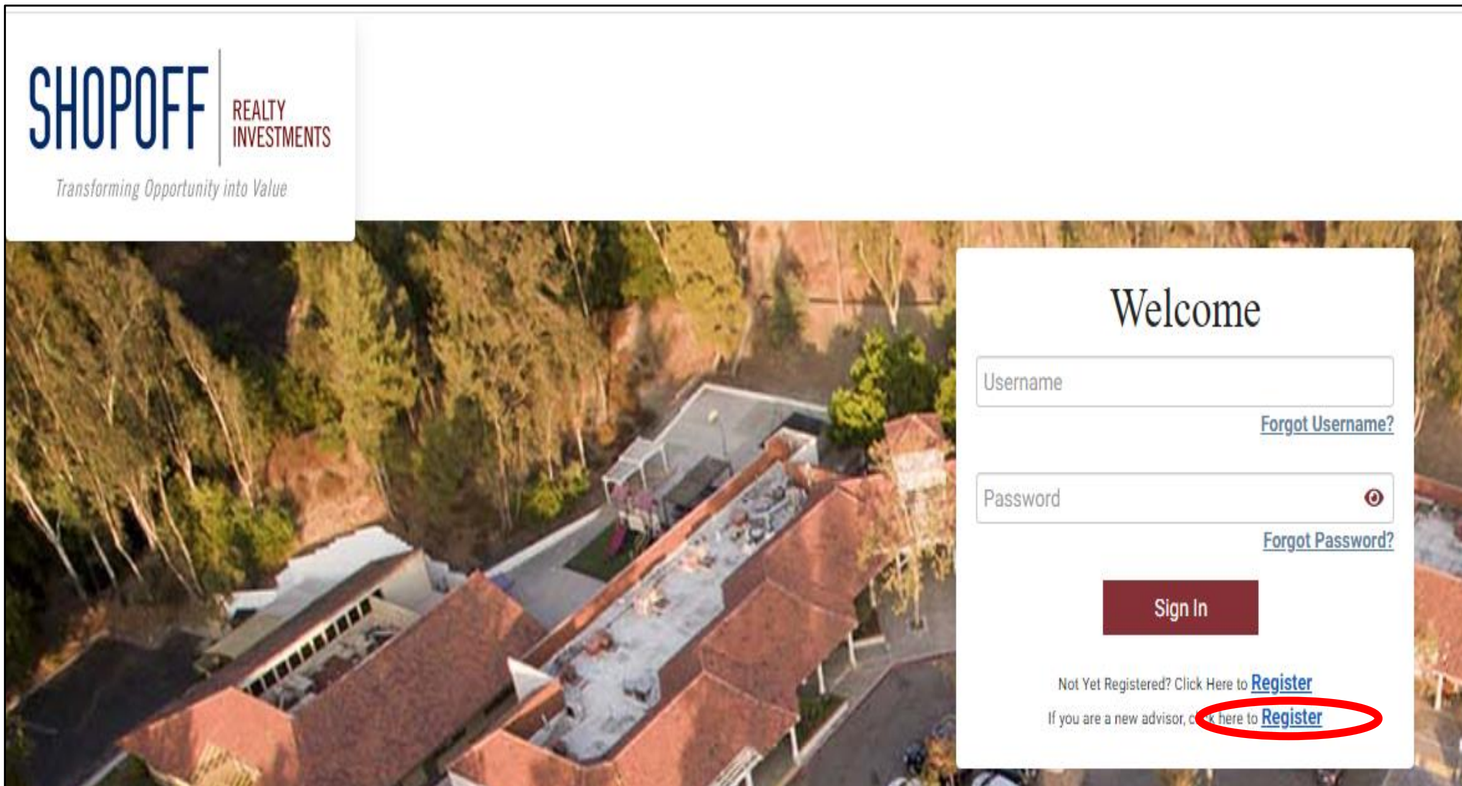
Advisor Portal Reference Guide

Advisor Portal – Welcome Page

https://starportal2.phxa.com/shp

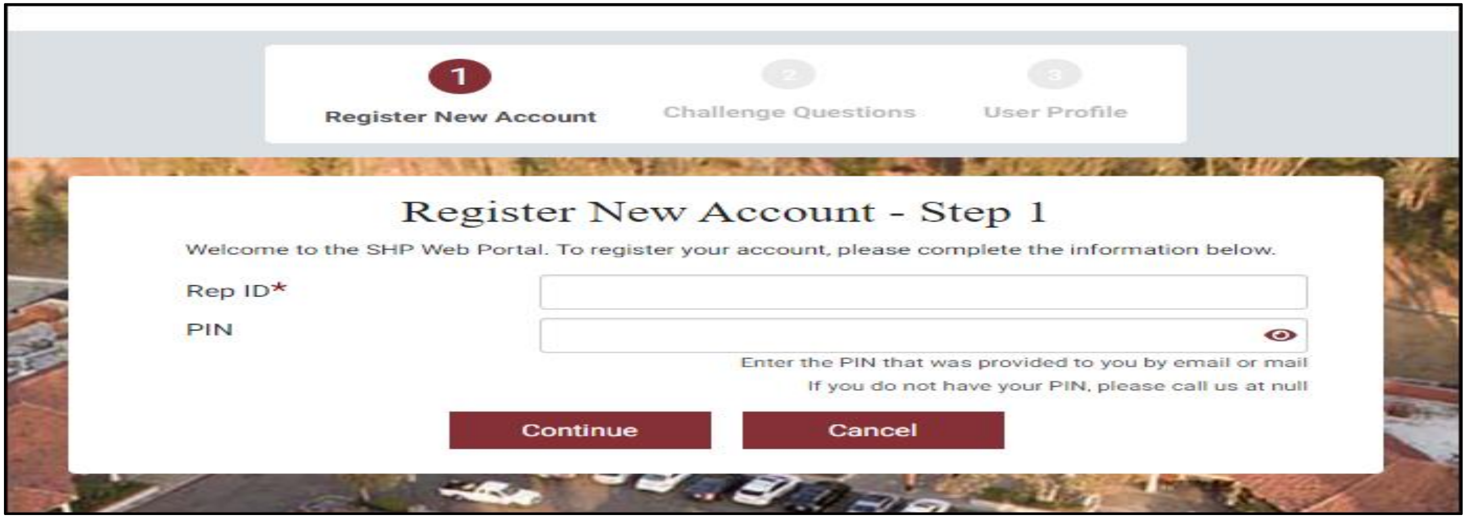
Input your **Username and Password**

New **Advisors**, click **Register** to set up your account

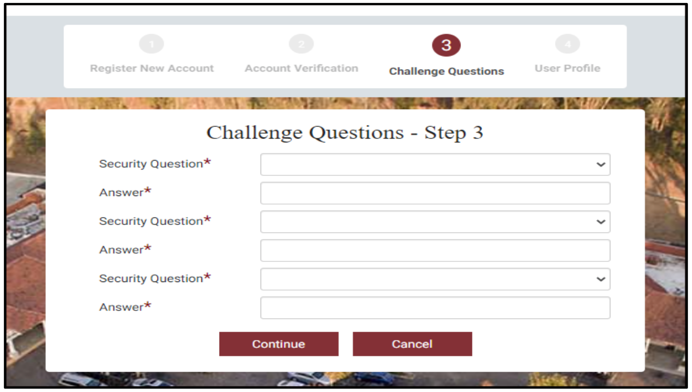


Advisor Portal – New Account Registration

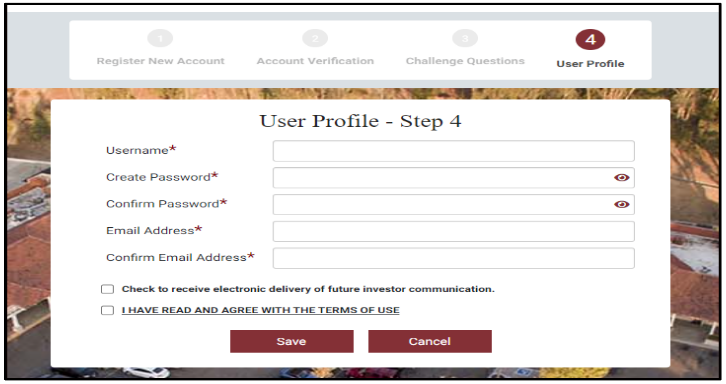
Step 1: Enter the Rep ID PIN emailed or mailed to you by Phoenix American
**The PIN is case-sensitive*



Step 2: Create challenge questions



Step 3: Create a username and password



If you need your Rep ID or Pin resent, contact investmentservices@shopoff.com

Advisor Portal – Home Page

Home Screen
Main account menu

Portfolio
Active Funds
Rep Documents

Rep Forms
Account Maintenance

Home [redacted]
Communications
Client Search
Client Statements
Taxes
Advisor Statements
Forms
Reports
Rep Profile
Log Out
Need Help?

Rep Portfolio

Email: [redacted]
Phone:

Active Funds:

I-10 LOGISTICS CENTER, LLC
SHOPOFF DLV QOZ BONUS UNITS
SHOPOFF DLV QOZ FUND, LLC
SHOPOFF FOUNTAIN VALLEY FUND LLC
SHOPOFF LAND FUND III, LP
SHOPOFF LAND FUND IV, L.P.
SHOPOFF LAND FUND V, L.P.
SHOPOFF MESA AZ INDUSTRIAL FUND, LLC
SHOPOFF MESA VERDE FUND, LLC
SHOPOFF OC DEVELOPMENT FUND, LLC

Rep Documents

Advisor Statements
Account Statement

Rep Forms

Beneficiary Designation Form
Broker Dealer Rep Change Request
Change Distribution Option
Custodian Change Form

Contact us

Please direct all inquiries to:

C/O PHOENIX AMERICAN FINANCIAL SERVICES
P.O. BOX 2189
SAN RAFAEL, CA

FAX: 1-415-485-4553

SHOPOFFSUPPORT@PHXA.COM
Investor Relations Department
949 – 417 - 1396

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Advisor Portal - Communications

Search Communications to access and download Investment Confirmations, Statements, Quarterly Reports

Communications

Fund

Time frame: Past 6 months

Message

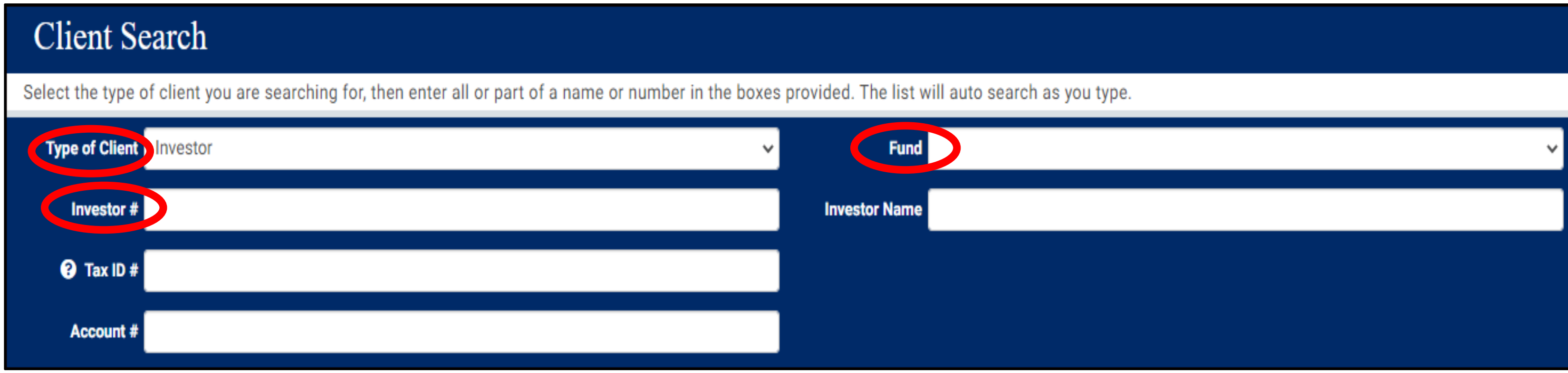
Type

All Unread

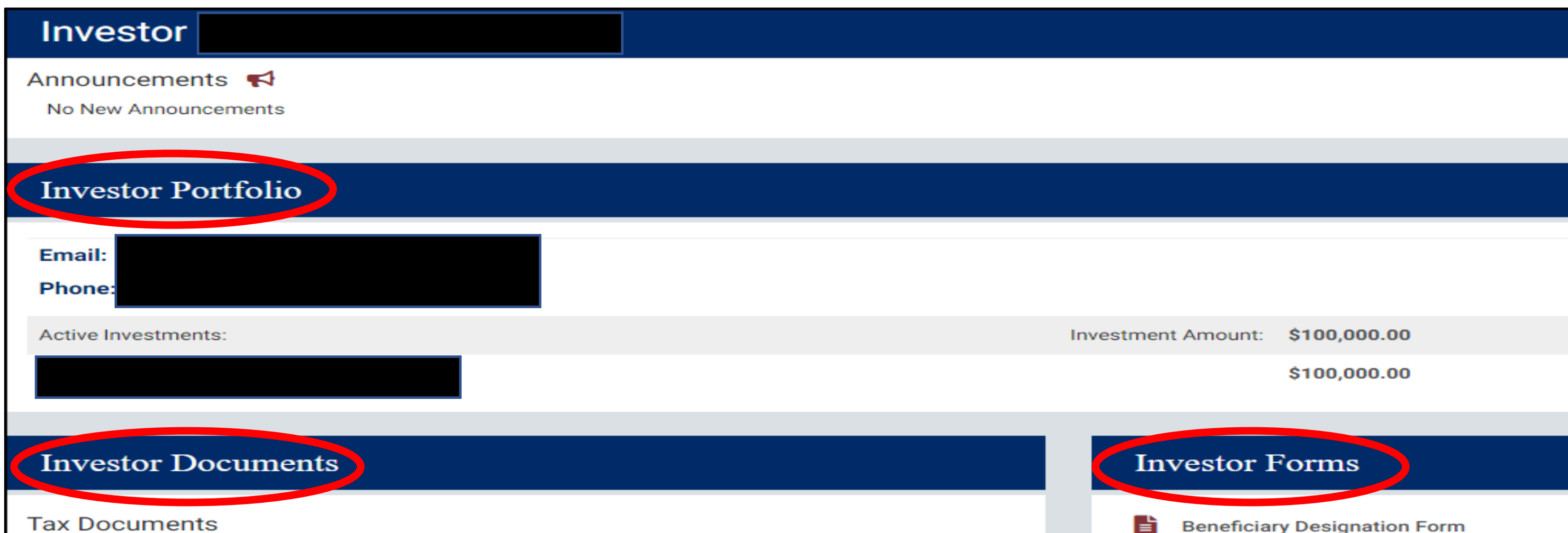
Message	Received ↓	Download
Investment Confirmation	01/04/2023	
Shopoff DLV QOZ Fund LLC - Supplement No. 4	12/22/2022	
Investment Confirmation	12/19/2022	
Investment Confirmation	12/19/2022	
Investment Confirmation	12/19/2022	
Investment Confirmation	11/29/2022	
Investment Confirmation	11/29/2022	
Investment Confirmation	11/29/2022	
Las Vegas Dream Hotel Breaks Ground	11/29/2022	
Shopoff OC Development Fund - Notice of Amended and Restated Operating Agreement	11/29/2022	

Advisor Portal – Client Search

Search for Investors by Name, Fund, Investor Number



Click on an Investor name to view account details



Advisor Portal – Client Statements and Taxes

Search and download Investor Account Statements

Client Statements

The list will auto search as you type. For Tax Id only enter the last 4 digits to search.

Fund SHOPOFF LAND FUND III, LP

Time frame Past 12 months

Investor Name

Account #

Tax ID #

	Reports Name	Investor	Fund	Date ↓	Download
	Account Statement	[redacted]	SLFIII	04/30/2022	
	Account Statement		SLFIII	04/30/2022	

Search for Tax Documents by Fund or Tax Year

Tax Forms

Fund

Tax Year All

Year ↓	Tax Statement	Fund	Subscription	Tax Guide	Download
2021	2021 K-1	UND	[redacted]		
2021	2021 K-1	SLF V			

SHOPOFF REALTY INVESTMENTS

Advisor Portal – Advisor Statements and Forms

Search for Statements by Fund or Time Frame

Advisor Statements

Fund | Time frame: Past 12 months

	Reports Name	Fund	Date ↓	Download
	Account Statement		04/30/2022	

Account change forms are available for download

Forms

These forms may be used to change account information or transfer your investment. All forms are in PDF format. Upon completion, please submit forms as instructed on the last page of each form.

Form ↑	Download
Beneficiary Designation Form	
Broker Dealer Rep Change Request	
Change Distribution Option	
Custodian Change Form	
Death Re-Registration Form	
Investor Address Change Request	
Title Transfer Form	
Trustee Certification of Investment Powers	

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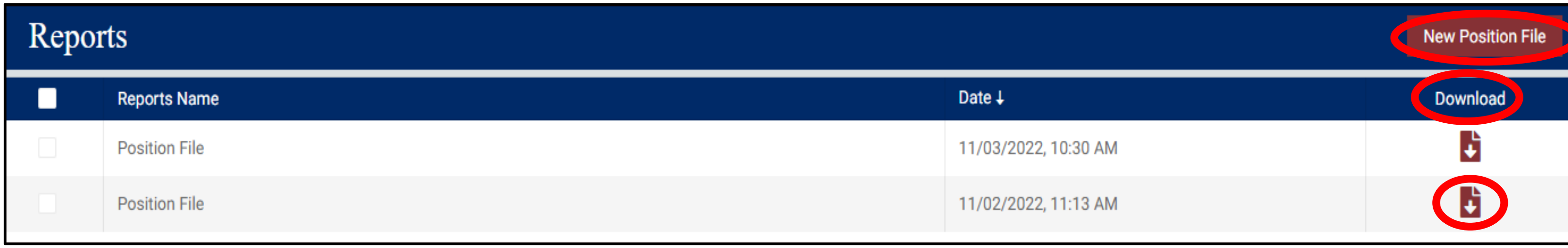
Advisor Portal – Reports and Rep Profile

Generate a New Position File to download in Excel. The position file will include all current details related to each of your client's investments.



View Advisor Profile, Account Information and Link Accounts