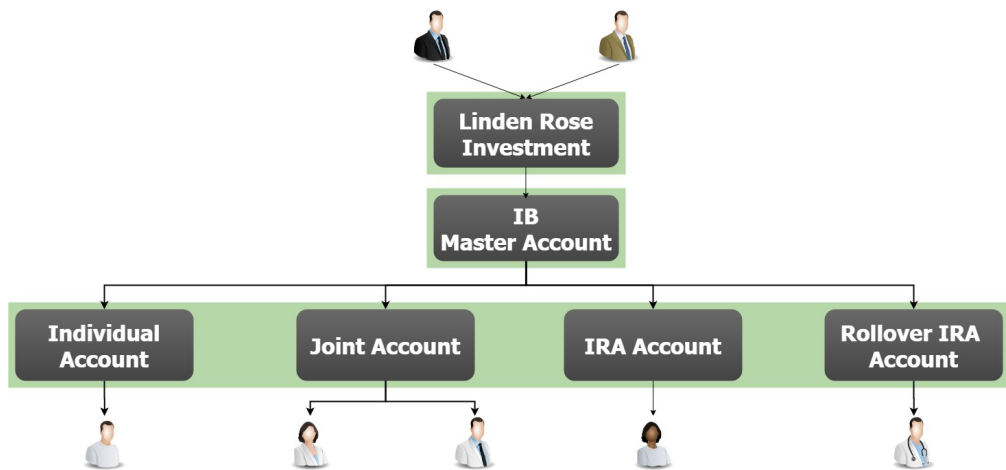




Invest with Linden Rose Investment LLC

Registered Advisor Account Structure



Steps to Invest

1. Open your own account at Interactive Brokers ('IB') or link your existing IB account to LRI Master Account
2. Account types include Individual, Joint, Traditional IRA, Rollover IRA, Roth IRA, SEP IRA, Inherited IRA, Trust/ LLC, etc.
3. e-Sign Client Advisory Agreement from LRI

How to Fund Your Account

1. Minimum investment is \$250,000 and annual management fee is 1.75% of the average net liquidation value of the account charged quarterly
2. For qualified clients, management fee is 20% of the returns in excess of the hurdle rate of 4% annually, subject to a high water mark of previous performance
3. Initiate Fund Transfers in IB account by Wire, Check, or ACH (recommended)
4. Transfer cash and positions in regular or IRA accounts from another US broker to IB via ACATS

Contact Us

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