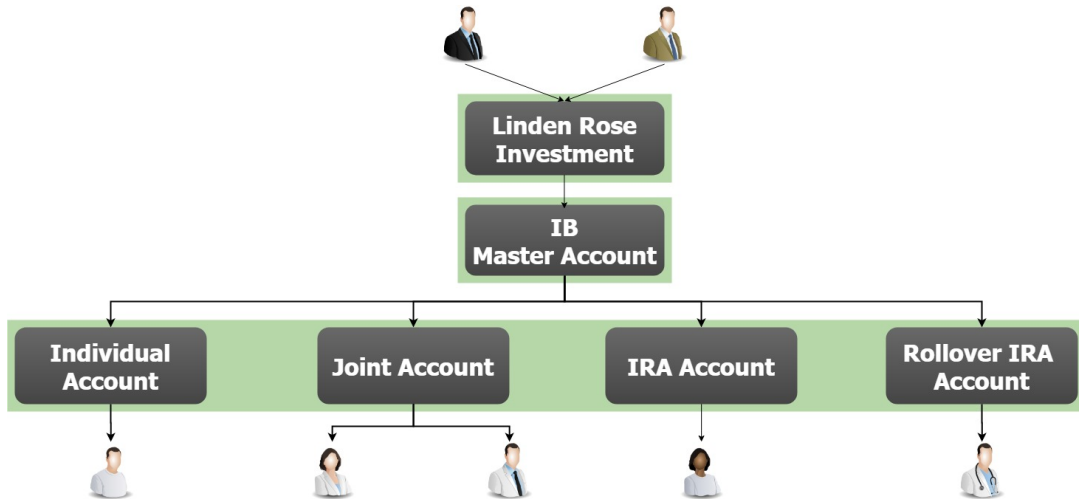




Linden Rose Investment

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
4. Quarterly account report and year end statement for tax purposes provided by IB

How to Fund Your Account

1. \$100,000 minimum investment
2. 1.2% of the account value (net asset value) per year as management fee and charged quarterly
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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