

It has come to our attention that scammers claiming to represent North Capital are soliciting loans. North Capital does not offer loans. Do not provide money or personal information to anyone claiming to offer loans from North Capital.



NORTH CAPITAL

ADVISORY SERVICES

BROKER DEALER SERVICES

INVESTMENT TECHNOLOGY

Services Offered Through North Capital

Advisory Services

Financial planning, advisory services and discretionary investment man

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Let us know if you have any questions. We are here to help!

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Broker Dealer Services

Your trusted advisor to manage your private offering from start to finish.

 [LEARN MORE \(https://www.northcapital.com/broker-dealer-services/\)](https://www.northcapital.com/broker-dealer-services/)

Technology

RegTech for issuers, banks, platforms, fund managers, and more.

 [LEARN MORE \(https://www.northcapital.com/technology/\)](https://www.northcapital.com/technology/)


Custody Services

Custody services for individuals, joint owners, entities, and trusts.

 [LEARN MORE \(https://www.northcapital.com/custody-services/\)](https://www.northcapital.com/custody-services/)

Escrow Services

Escrow services for Reg D, Reg A+, Reg S, and Reg CF offerings.

 [LEARN MORE \(https://www.northcapital.com/escrow-services/\)](https://www.northcapital.com/escrow-services/)

Investment Products

Strategically selected investment opportunities.

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OVER

67

Partners

OVER

964

Private Deals

OVER

61,000

Individual Transactions

OVER

\$1.3 billion

Raised

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Advisory Services

North Capital is a fee-only investment advisory firm with offices located in:

- California
- Georgia
- New York
- Pennsylvania
- Singapore
- Texas
- Utah

Founded in 2008, North Capital provides financial planning, advisory services and discretionary investment management to individuals, families, businesses and non-profit institutions across the United States.

- ✔ Portfolio Management
- ✔ Financial Planning
- ✔ Professional Consulting
- ✔ Diversification
- ✔ Lifetime Financial Analysis Report
- ✔ Experienced Team

LEARN MORE (<https://www.northcapital.com/advisory/>)

CONTACT US (<https://www.northcapital.com/contact-us-advisory/>)

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Broker Dealer Services

North Capital Private Securities (NCPS) is a registered broker dealer focused on the marketing and distribution of private funds and the securities of private companies to qualified investors, such as family offices, funds of funds, endowments, foundations, and pension funds. Our principals have expertise in the origination, structuring, and marketing of private offerings, and we serve as your trusted advisor to manage your offering from start to finish.

- ✔ Experienced Team
- ✔ Perform Investor Verification
- ✔ Manage Investor Records
- ✔ Ensure Transparency and Investor Protection
- ✔ Perform Due Diligence
- ✔ Experts In Compliance
- ✔ Transact Offerings
- ✔ Supervisory and Advisory Services

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CONTACT US (<https://www.northcapital.com/contact-us-broker-dealer/>)

Technology

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North Capital offers technology-based investment solutions to broker-dealers,

banks, fund managers, funding platforms, and private issuers who wish to access

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private investment markets.

Our products include:

- **[TransactAPI \(https://www.northcapital.com/transactapi/\)](https://www.northcapital.com/transactapi/)**
- **[Marketplace-as-a-Service \(https://www.northcapital.com/marketplace-as-a-service/\)](https://www.northcapital.com/marketplace-as-a-service/)**
- **[DirectInvest Button \(https://www.northcapital.com/directinvest-button/\)](https://www.northcapital.com/directinvest-button/)**
- **[DirectAccreditation Button \(https://www.northcapital.com/directaccreditation-button/\)](https://www.northcapital.com/directaccreditation-button/)**

- ✔ RESTful API
- ✔ Know Your Customer (KYC) Checks
- ✔ Anti Money Laundering (AML) Checks
- ✔ Accredited Investor Verification
- ✔ Accepts ACH Transfer, Check, or Wire Transfer
- ✔ Send Documents for Electronic Signature
- ✔ Download Offering Documents
- ✔ Secure Storage of Personal & Confidential Information

[VIEW API DOCUMENTATION \(https://www.northcapital.com/escrow-services/\)](https://www.northcapital.com/escrow-services/)

[LEARN MORE \(https://www.northcapital.com/technology/\)](https://www.northcapital.com/technology/)

[CONTACT US \(https://www.northcapital.com/contact-us-technology/\)](https://www.northcapital.com/contact-us-technology/)

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Custody Services

North Capital Private Securities provides custody services for individuals, joint owners, entities, and trusts. Our online portal allows our customers to view their account balances, generate reports, and view transactions in real time. Contact us today to open your custodial account.

- ✔ \$0 account opening or maintenance fees.¹
- ✔ \$0 account minimum.¹
- ✔ ACH, Wire, and Check funds processing
- ✔ Online access to view account in real time
- ✔ Quick and easy account set up

OPEN A CUSTODY ACCOUNT (<https://www.northcapital.com/custody-account-step-1/>)

LEARN MORE (<https://www.northcapital.com/custody-services/>)

CONTACT US (<https://www.northcapital.com/contact-us-custody/>)

¹Other account fees, fund expenses, and brokerage commissions may apply.

Escrow Services

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North Capital Private Securities is a self-clearing broker-dealer approved to provide escrow services for offerings under Reg D, Reg A+, Reg S, and Reg CF offerings. We offer a full technology stack to facilitate the automatic creation and processing of

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deal escrows.

Our team has years of experience in private securities and provides efficient, compliant processes to help guide you through your capital raise from opening escrow, accepting funds, processing returns, disbursing funds, and closing the account. Contact us to open your escrow account today!

- ✔ Escrows for all private offerings including Reg A, Reg CF, Reg D, and Reg S.
- ✔ Same-day view into account activity
- ✔ Regulatory Compliant Processes
- ✔ Investor KYC and AML Verification
- ✔ ACH, Wire, and Check funds processing
- ✔ Domestic and International investors
- ✔ Quick and easy account set up
- ✔ Competitive Pricing
- ✔ E-sign Escrow Agreements
- ✔ Private Securities Experienced Team

OPEN AN ESCROW ACCOUNT (<https://www.northcapital.com/contact-us-escrow/>)

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Investment Products

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North Capital Private Securities offers strategically selected investment opportunities. The investment opportunities are either sponsored by an affiliate of North Capital, or sourced from one of North Capital's growing list of partners. The investment opportunities are "frontier alternatives", alternative investments that investors are unlikely to encounter in public markets. Currently we have three investment opportunities, all related to real estate, with one having an Impact focus. (**REITless Impact Income Strategies**, (<https://www.northcapital.com/reitless/>) **MogulREIT I**, (<https://www.realtymogul.com/investment-opportunity/193744>) and **MogulREIT II** (<https://www.realtymogul.com/investment-opportunity/274949>)). More products will be launching soon so please check back for updates to our offerings.

LEARN MORE (<https://www.northcapital.com/investment-products/>)

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