

avestor

onboarding checklist

detailed checklist: bit.ly/4eYsJiB



Phase 1: Complete Your Legal Questionnaire

	Watch Videos	notes :
	Fill out the Legal Questionnaire	
	Book a call with Sanjay	
	Complete Bad Actor Events Questionnaire	
	Complete Attorney Authorization Form	
	Complete Bank Authorization Form	
	Schedule an Intro Meeting with the team	

Phase 2: Legal & Banking

	Attorney Engagement call	notes :
	Obtain your IRS EIN letters for both your fund and managing entity	
	Sign your finalized PPM, Operating Agreement, Subscription Agreement to be uploaded by Avestor into your investor registration page	
	Setup your bank accounts for both your fund and managing entity with Meow or your preferred bank	
	Login to the Get Started Videos page and start learning how to use the portal	

Phase 3: Portal & Fund Readiness

	Submit your graphics/logo. If you already have a pitch deck, submit that too.	notes :
	Fund manager headshots - 506c funds only	
	Join Slack	
	Finalize Bank Account Setup	
	Post Launch meeting with the team	