



Seraf Product Overview for Individual Accounts

Following is a brief overview of what you'll find in each section of your account along with additional links to Seraf's [Help Center](#) to provide further information. Once your investment data is added, you'll see how each page displays your information in an organized framework, making it easy to access, view and analyze your investments. Be sure to look for tabs, links, and hover text that will provide further detail about your investments.

[Dashboard](#) - View your account overview and performance highlights at a glance. Gain insights into your current holdings, recent activity, returns and IRR. See reminders for upcoming important dates along with recent portfolio company investor reports and financial statements.

[Current Investments](#) - View your active holdings by company, by round, or by fund, by choosing the appropriate tab. Track each company's cost basis and current value while viewing the industry and product description. If you've invested in multiple rounds of a company, quickly see the dates and amounts for each individual round. If you invest in a fund, track fund commitments, calls, amount remaining and current value. You can always click on any company, round, or fund name to access more details including website, address, and contacts, as well as related transactions, important dates and documents.

[Exits & Returns](#) - View your exits and returns to celebrate your successes and learn from your mistakes. See how much you've invested, how much has been returned, net proceeds, return multiple, realized IRR, and any remaining value along with its unrealized IRR. Entities marked as "Current" have some holdings as well as some form of exit, whereas companies not marked as such are completely exited and have no remaining or future value. View exits by Company, by Round, or by Fund for a deal-by-deal breakdown of your investment returns.

[Portfolio Analysis](#) - Gain powerful insights into your portfolio's performance, including diversification, growth, IRR, annual stats and valuation metrics, while viewing relevant and meaningful charts and graphs. View key investment metrics. Analyze, understand and learn from your portfolio so that you can make data-driven investment decisions in the future.

[Transaction Register](#) - View a history of your investment transactions in chronological order. Click on the transaction type to access details about each transaction, including stock purchases and sales, note purchases and redemptions, interest paid, and more. As with most tables, you can export your records as a way to share investment details with family members, tax attorneys, financial planners, and advisors.

[Documents & Reports](#) - Review and upload term sheets, deal documents, financial statements, investor reports, copies of share certificates and other investment records for safe keeping and easy retrieval. Add a new document by [uploading](#) it or [emailing](#) it directly to your account. Monitor which portfolio entities are [overdue](#) on their reporting. Also, access your



[Account Statement](#) for built-in reporting about your portfolio. Generate reports for any time period on demand to view, print or download. Note that members of investment groups and funds using Seraf's Enterprise Portal will find Documents and Reports in separate sections along with Company Updates.

[Important Dates](#) - Review important calendar events related to your investments. Key dates, such as convertible note maturity dates and warrant expiration dates are automatically deemed important once they are entered at the Round level. [Set reminders](#) to appear on your Dashboard, so you don't miss any important future events or deadlines that may impact your portfolio returns.

[Portfolio Management](#) - View and [edit](#) entries, as well as export all of your investment records, including Companies, Funds, Rounds, Transactions, and Valuations from each of the different tabbed sections. Enter data in bulk using our [import template](#). [View and sort company contacts](#) based on different parameters. Note: Access to funds, contacts and valuations is dependent upon account level.

[Account Management](#) - View and edit your account details such as login information, including your username and password. Enter your account settings and select the preferred currency to use throughout your account. Add [Investment Accounts](#) to track investments made through different vehicles, such as a trust or IRA. Set up your own Seraf email address to forward documents to your account. Access a referral code to share with others and earn one month of Seraf free. View your subscription plan, renewal date, option to upgrade your account, and ability to update your payment method. For members of investment groups using Seraf's Enterprise platform, notify your account manager if you need to change the name of your account, email address, or investment accounts.

Add New - Make context-sensitive entries directly from the left hand menu bar. Seraf requires that each direct investment in a [company](#) has a [round](#) and [transaction](#) associated with it. If you have multiple investments in the same company, you may need to add several rounds and transactions to track your holdings accordingly. If you invest in [funds](#), follow a similar process by [adding an investment fund](#) and [fund transactions](#). [Set valuations](#) to accurately record the current value of your holdings. [Add a new document](#) for safe-keeping and easy future reference. [Add important dates](#) so you don't miss out on future events. Learn more about [how to add your investments to Seraf](#).

Access Articles, Templates & Resources

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Depending on the type of subscription you have, you may not have access to all the features noted above. If you'd like to upgrade your account, go to [Account Management](#) and select "Upgrade Now". Select "Sign Up" under the plan to which you'd like to upgrade and follow the prompts.

If you are a member of an angel group using Seraf's Enterprise platform, you may be entitled to a 50% discount off of our Professional Plan. Please [contact us](#) for more information.

Seraf's many features are searchable in our [Help Center](#), accessible in the header of every page. If you find that you need additional assistance or have questions, please [contact us](#).