

COLLECTIVE WEALTH CREATION

P: (07) 3373 0233

E: enquiry@exceedcapital.com.au

exceedcapital.com.au



SOPHISTICATED/WHOLESALE INVESTOR CRITERIA

To qualify as an investor with Exceed Capital, you must meet the wholesale or sophisticated investor requirements as defined under the Corporations Act. This can be achieved through an accountant certificate verifying that you:

- Earned at least \$250,000 per year in the last two financial years, or
- Have net assets of at least \$2.5 million, or
- Invest at least \$500,000 in a single trust or investment.

Our minimum investment is **\$100,000**; however, for those investing under \$500,000, an accountant certificate is required.

For further information, please contact us on

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