GUIDE 01 OF 10

Onboarding: Sign Up, Finish Setup and Accreditation

Go to markets.liquidity.io (or download the Liquidity app) and enter your email address or mobile number. We send you a one-time code to confirm it. There is no password to create or remember.

Step by step

1. Open markets.liquidity.io on a computer, or download the Liquidity app from the App Store or Google Play on your phone.
2. Choose Email or Mobile number, enter your details and tap Continue.
3. Enter the one-time code we send you. By continuing you agree to the Terms of Service, Privacy Policy, Biometric Policy and Patriot Act notice.
4. Finish setup: complete your profile, enter your legal name, date of birth, address and Social Security Number, and verify your identity.
5. Create your Liquidity wallet when prompted (see the Wallet Creation guide).
6. Optional: if you want access to private offerings, pledges or secondaries, choose Get accredited, select your basis (income, net worth or professional certification) and upload your documents.
7. Watch for email and in-app notifications confirming your verification and accreditation status.

Frequently asked questions

Who can open an account?

Liquidity is currently available to individual investors who are US residents. A valid US Social Security Number is required to verify your identity.

How do I sign in after I have an account?

Enter the email address or mobile number on your account and type in the one-time code we send you. Each code works once and expires after a short time.

Securities brokerage services are provided by Liquidity.io LLC, a member of FINRA/SIPC. Equity clearing by Alpaca Securities LLC; cryptocurrency by Alpaca Crypto LLC. Liquidity does not provide investment advice. All investments involve risk, including loss of principal.

What does "Finish setup" mean?

Finishing setup means completing your profile, verifying your identity and creating your Liquidity wallet. Once setup is finished you can deposit funds and access public stocks, ETFs, crypto and fixed income.

What information do I need to finish setup?

You will be asked for your legal name, date of birth, residential address, Social Security Number and a few profile and suitability questions required of a registered broker-dealer. You may also be asked to take a photo of a government-issued ID.

How long does identity verification take?

Most verifications complete within minutes. If we need more information, you will see a message in the app and receive an email explaining what to do next.

What is accreditation and do I need it?

Accreditation confirms you meet the SEC definition of an accredited investor. You only need it for private offerings, including Reg D offerings, pledges in upcoming raises and secondaries. Public markets and Reg CF offerings do not require accreditation.

How do I get accredited?

From your profile, choose Get accredited and select the basis that applies to you, such as income, net worth or a professional certification. Upload the supporting documents or a verification letter, then submit for review.

How long does an accreditation review take?

Reviews are typically completed within a few business days. You will be notified by email and in the app when your status changes.

Can I deposit before my accreditation is approved?

Yes. Once setup is finished you can deposit funds while your accreditation is under review.

Why was my verification or accreditation declined?

The most common reasons are unclear documents, information that does not match your profile, or documents that are out of date. The notification will explain the reason, and you can resubmit or contact support for help.

Need help? Use the Help menu in the Liquidity app or at markets.liquidity.io, email support@liquidity.io or call +1 (702) 379 5528.

Securities brokerage services are provided by Liquidity.io LLC, a member of FINRA/SIPC. Equity clearing by Alpaca Securities LLC; cryptocurrency by Alpaca Crypto LLC. Liquidity does not provide investment advice. All investments involve risk, including loss of principal.