

Community Investment Trust Documentation for Investors

- My Accounts
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- Bank Information
- Bank Account List
- Banks Table
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- Messages
- Change Request
- Assessment Test
- Holdings
- Cashout

Welcome to the documentation for the **Investors** version of the **CIT App**. See below to get started.

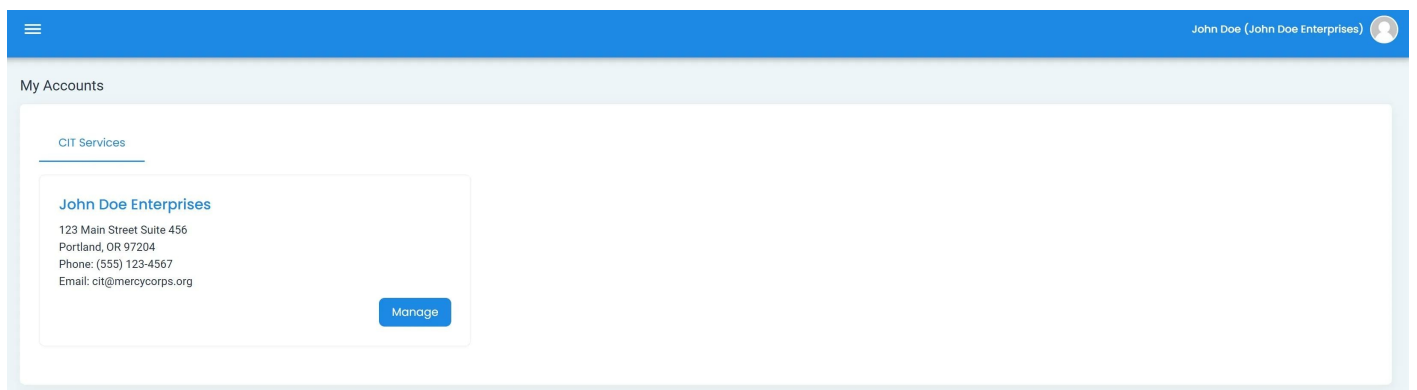
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My Accounts Category

The **CIT App** will always open up to the **My Accounts Page**



CIT App, My Accounts Screen, Homepage

The main feature of the **My Accounts Page** is that it allows you [Manage Different Accounts](#)

Note

You can navigate to the rest of the app through the [Primary Sidebar](#).

For more on navigation and the primary sidebar, see [General Sidebar Navigation](#) page.

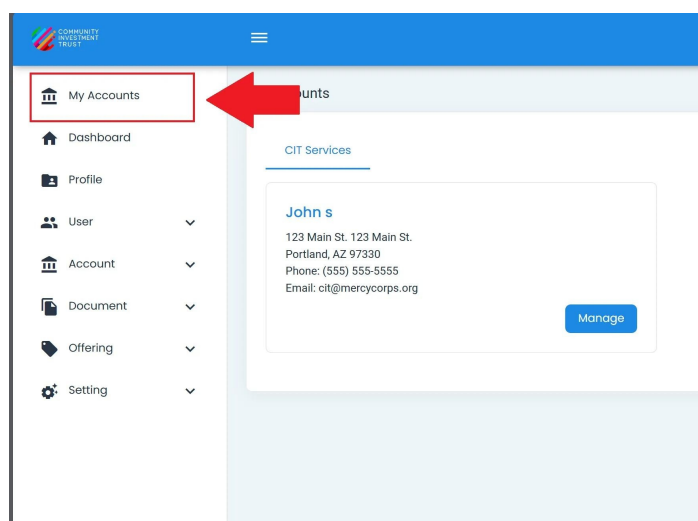
My Accounts

Managing Different Accounts

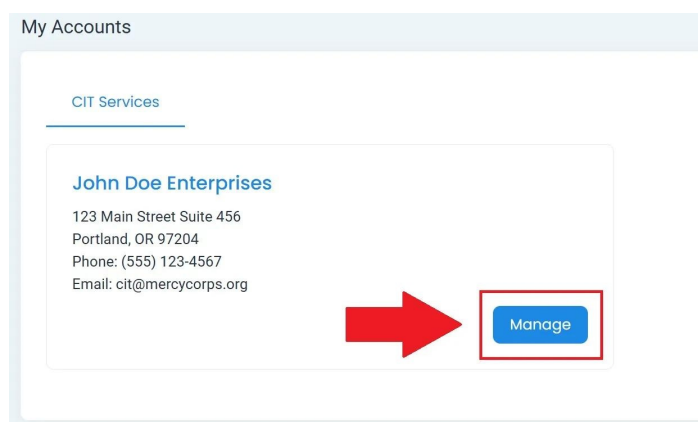
Managing accounts allows you to quickly navigate between the homepages of different accounts.

To **Manage an Account**:

1. Go to the [My Accounts](#) page.



2. Find the account you want to manage.
3. Select Manage next to the account name.




4. Ensure that the [Account Being Managed](#) matches the account that you selected.

Identifying the Current Account

Identify the current account you are using by looking for the account name next to your profile picture.



The account name is the name surrounded by parentheses

 **Account Name Example**

I.e., ({current account being managed}) .

It is:

- to the *right* of your login name.
- to the *left* of your profile picture.

Dashboard

The  section for **Investors** allows Investors to:

- View all their investments,
- Check investment statuses,
- [Re-enroll in investments](#),
- [De-Enroll in investments](#)

../_static/solo_app/Dashboard/dashboard-investors.jpeg



Dashboard, Investors, One Investment

Re-Enrollment Instructions

Follow the instructions below to re-enroll in an investment:

1. Find the investment you want to re-enroll in.

2. Click on “Re-enroll” button

- Click on the **Re-enroll** button for the investment you want to enroll or denroll from.

../../../../_static/solo_app/Dashboard/re-de-enroll-button-location.jpeg



Dashboard, Re-Enroll Button Location

3. Answer the pop-up message by clicking either the or selections.

../_static/solo_app/Dashboard/dashboard-investors-re-enrollment-popup.jpeg



Dashboard, Re-Enroll Pop-up

✔ Action Complete

You have successfully re-enrolled in the investment. You should see the following as a result:

[../_static/solo_app/Dashboard/dashboard-investors-re-enrollment-popup-action-complete.jpeg](#)



Dashboard, Re-Enroll Action Complete

De-Enrollment Instructions

Follow the instructions below to de-enroll in an investment:

1. Find the investment you want to de-enroll in.
2. Click on the **De-enroll** button
 - Click on the **De-enroll** button for the investment you want to enroll or denroll from.

../../../../static/solo_app/Dashboard/dashboard-investors-request-stop-investing-button-location.jpeg



Dashboard, De-Enroll Button Location

3. Answer the pop-up message

- Answer the pop-up message by clicking either the or selections.

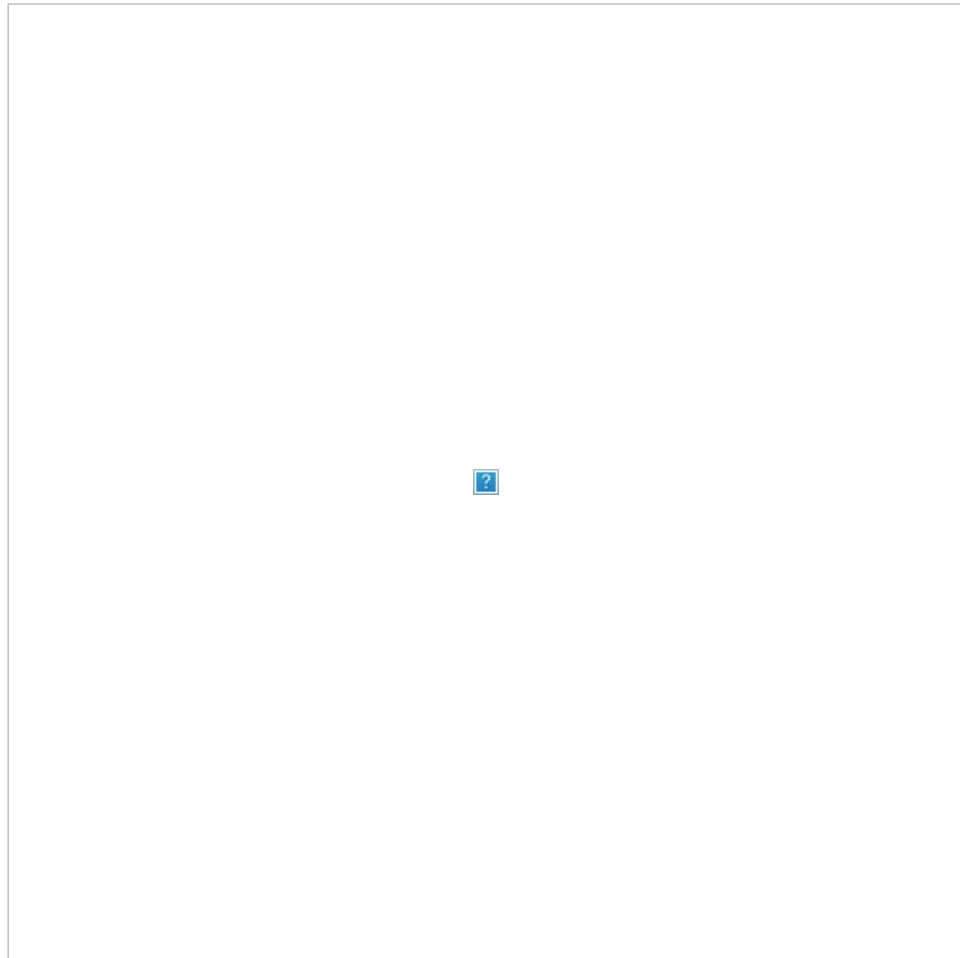
../../../../static/solo_app/Dashboard/dashboard-investors-de-enrollment-popup.jpeg



Dashboard, De-Enroll Pop-up


✔ Action Complete

You have successfully de-enrolled in the investment. You should see the following as a result:




Dashboard, De-Enroll Action Complete

Investor

The  section opens up to a table with two different tabs:

- [Investor Information Tab](#)
- Beneficiary Tab

Investor Information Tab

The  tab opens up to an editable table:

Investor Information

Beneficiary

Investor Info

Name*

SSN

***-**-9999

Date of Birth

Email*

Phone

Primary Address

Street Name*

Portland St.

Suite/Apt Number

City*

Portland

State*

Oregon

Zip Code*

97236

Mailing Address

(Street name is empty. Defaulting to primary address.)

Street Name

Suite/Apt Number

City

State

Zip Code

Name Change Request

Save Changes

Investor Information Tab

The available information located on the **Investor Information** tab includes the following:

- Personal Information
- Contact Information
- Primary Mailing Address
- Mailing Address

Note

Click inside any cell that isn't greyed out to start editing.

Beneficiaries Tab

The **Beneficiaries** tab allows you view information about beneficiaries.

../_static/solo_app/Investor/investor-beneficiaries-tab-no-beneficiaries.jpeg




Beneficiaries Tab

Document

This following  are included in the  **Document** category for Investors:

1. [Offering Signed Documents](#)
2. [Financial Documents](#)

Bank Information

The  section includes all information related the banking information we have for you online.

../_static/solo_app/BankInformation/bank-information-homepage.jpeg



Bank Information

The **Bank Information** section is broken up into two subsections:

- Bank Account List
- Banks Table

Bank Account List

The Bank Account List subsection for this page is located at the top of the page. Banks here are listed in tile-format.



Bank Information, Bank Account List Location

Banks Table

The `Banks` table has the following `columns` :


- `id`
- `Bank Name`
- `Routing Number`
- `Action`

../_static/solo_app/BankInformation/banking-information-homepage-banks-table-column-location.jpeg



Bank Information, Banks Table, Columns Location

Investment

The  section covers everything listed in the **Table of Contents** below:

Contents

Investment

- [Investments Homepage Location](#)
- [Investments List Table Overview](#)
- [Using Investments Filters](#)


Investments Homepage Location

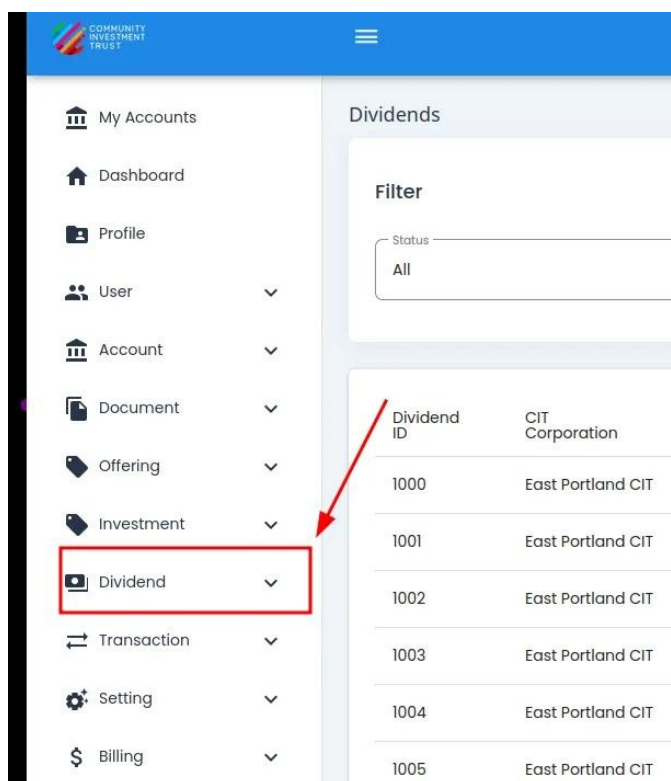
To Find the Investments List Homepage:

1. Locate the primary sidenav to the left of the page.

Don't see the sidenav?

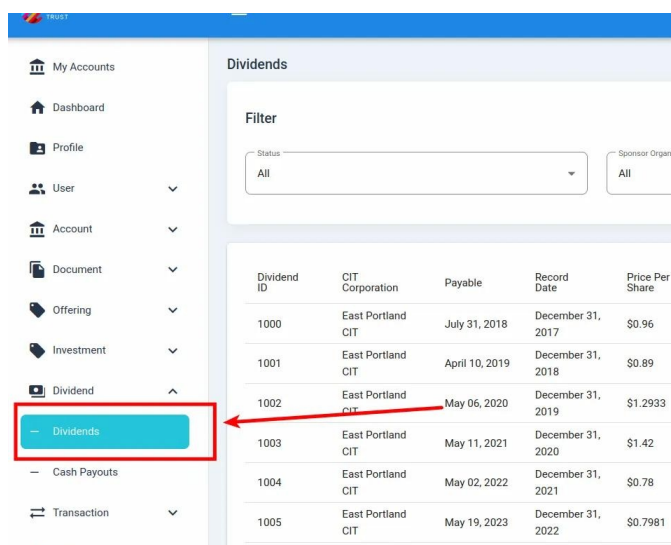
See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the  **Investment** category.



Investment Category, Primary Sidenav Location

3. Select  **Investments** from the dropdown.



Investment, Investments, Primary Sidenav Location

[Investments List Table Overview](#)

The **Investments List** table is what first appears on the homepage of the **Investments** section.

Investments

Filter

Status

Open

CIT Corporation

All

Search

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
		New UserInvest				
1113	East Portland CIT	newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	February 15, 2025	\$50.00	Open
		Carl Podevn				

Investment, Investments List Table

Using Investments Filters

To Filter Investments:

1. Locate the filter section at the top of the table.

Investments

Filter

Status

Open

CIT Corporation

All

Search

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	February 15, 2025	\$50.00	Open
		Carl Podevn				

Investments Table Filter Section Highlighted

2. Click on the Status dropdown to filter by status.

Investments

Filter

Status

Open

CIT Corporation

All

Search

Q

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Padeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	February 15, 2025	\$50.00	Open

Investments Status Dropdown Location

The status dropdown will expand, showing available status options:

Filter

Status

Open

CIT Corporation

All

Search

Q

Investor	Offering Year	Investment Date	Investment Amount	Status
New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
Carl Padeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
Test Account TestEmail@gmail.com (859) 992-1866				

Investments Status Dropdown Expanded

3. Select the organization dropdown (e.g., CIT Corporation).

Investments

Filter

Status

All

CIT Corporation

All

Search

Q

CIT Corporation Dropdown Location

The dropdown will expand, showing available organization options:

CIT Corporation

All

All

Search

Q

Investor	Offering Year	Investment Date	Investment Amount	Status

4. Click the search icon to apply filters.

[illegible]

Search Icon Location

Your filtered results will appear:

Investments

Filter

Status

All

CIT Corporation

All

New UserInvest

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	<div>New UserInvest</div> <div>newuserinvest@tol.com</div> <div>(503) 720-2583</div>	2025	March 15, 2025	\$50.00	<div>Open</div>
1103	East Portland CIT	<div>New UserInvest</div> <div>newuserinvest@tol.com</div> <div>(503) 720-2583</div>	2025	February 15, 2025	\$50.00	<div>Open</div>

Items per page:

10

1 - 2 of 2

Search Results

Messages

This is the  Messages section. It still needs to have information added to it.

Change Request

This is the **Change Request** section. It still needs to have information added to it.


Assessment Test

This is the **Assessment Test** section. It still needs to have information added to it.

Holdings

This is the holdings page. Information still needs to be added.

Cashout

This is the  section. It still needs to have information added to it.