



Seed Candidate Preliminary Review

To submit an investment strategy for our consideration, please complete and send this form by email to *harvest@moodyaldrich.com*. Be sure to attach additional documentation and supporting materials as necessary.

Firm name:

Contact name/title:

Phone:

Email:

Location:

Fund name, legal structure and domicile:

Describe strategy and market, asset class and geographic focus:

Describe how you think your approach has a competitive advantage:

Inception date:

Firm and fund AUM (\$):

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Partner capital invested:

**Key team members and job history
(firm, tenure, title/role):**

ATTACH BIOGRAPHIES SEPARATELY

Firm ownership:

Fee structure:

Liquidity terms:

Annualized gross and net performance:

ATTACH MONTHLY RETURNS SEPARATELY

Volatility:

% Months up/down:

Largest drawdown:

Net and gross exposure ranges:

Long and short exposure ranges:

Number of positions (average):

Annual turnover (average):

SEC registered?

- Yes No In process

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Administrator:

Auditor:

Prime broker:

Number of staff members:

Describe your previous investing experience—what products you managed, where, for how long, and how successful you were. If multiple key team members, describe each:

ATTACH RELEVANT AVAILABLE TRACK RECORDS SEPARATELY

Risk management approach, current controls in place, and systems used:

Litigation/regulatory issues, if any:

Proposed seeding arrangement:

» SUBMIT FORM