THE COORDINATION LAYER

Investing in US funds from Germany comes with obligations nobody briefed you on.

Withholding forms, K-1s your German advisor cannot read, and a group filing you cannot complete alone. Plainly LP makes the process plain and coordinates the work between the US fund, the other investors, and a licensed local tax advisor.

01 / WHAT IS ACTUALLY AT STAKE

01

Withholding

A missing or incorrect W-8BEN or W-8BEN-E can mean 30 percent US withholding on distributions. The form has to match your actual structure, and it expires.

02

The group filing

Where a US fund has more than one German investor, German law provides for a unified filing for the group. No single investor and no single advisor can complete it alone.

03

How you hold it

Private or through a holding company changes which documents are needed and how the fund's reporting is used. That is the starting question of every engagement.

02 / TWO WAYS TO HOLD THE INVESTMENT

Track A — Private investor

You invest as an individual directly into a US fund or SPV. How the fund's income enters your personal filings is determined by your advisor, working from input prepared by Plainly LP.

FEWER MOVING PARTS IN THE ANNUAL DOCUMENT CYCLE.

Track B — GmbH holding

You invest through a German holding company. How the investment is carried and updated each year is determined by your advisor, working from the fund's reporting.

MORE DOCUMENTS EACH YEAR, ON THE SAME ANNUAL RHYTHM.

03 / WHAT PLAINLY DOES FOR YOU

One contact, and a process you can follow.

One point of contact

For the fund, the other investors, and the licensed tax advisor.

Consent first

Your data is shared only with your written consent, document by document.

Visible status

You see where the process stands at every step, on the portal.

Costs up front

You pay your share of the actual costs, disclosed before anything starts.

04 / HOW THE COORDINATION RUNS

01 **Intake**
You tell us how you hold the investment and which funds are involved.

02 **Consent**
You approve, in writing, exactly which documents may be shared and with whom.

03 **Coordination**
We collect fund reporting, align the other investors, and brief the advisor.

04 **Filing**
The advisor prepares and files. You keep a complete record of every step.

05 / WHAT IT COSTS, AND WHAT IT IS NOT

There is no cost to the fund. Investors pay their own share of the actual advisory costs, disclosed before anything starts. Plainly LP coordinates documents, consents, and timelines; it does not give tax or legal advice, does not raise capital, and does not replace your fund administrator or your advisor.

Register your interest

plainlylp.com/investors

No commitment, no invoice. We read every submission and respond personally.