



NEWS RELEASE

SoFi Expands Access to Private Markets with Funds From CAZ Investments and AngelList Asset Management

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The funds expand access to private market investment strategies traditionally used by institutional investors to SoFi Invest members.

SAN FRANCISCO--(BUSINESS WIRE)-- SoFi Technologies, Inc. (NASDAQ: SOFI), the everything app for digital financial services, today introduced three new private market funds from CAZ Investments and AngelList Asset Management. These funds provide exposure to private market strategies across AI, fintech, healthcare, defense, and other sectors, with investments that may include companies such as OpenAI, Anthropic, Anduril, and others.

Investors are looking beyond traditional stocks and bonds, but the complexity of private market investing has historically put these strategies out of reach for many. SoFi Securities LLC, is helping bridge that gap by pairing expanded access to these private market strategies with educational resources that empower members to invest with greater confidence. The new funds include:

- CAZ GP Stakes Fund: Seeks long-term capital appreciation and current income by investing primarily in alternative asset management firms, including firms that manage private equity, private credit, real estate, infrastructure, commodity-related securities, and venture capital strategies.
- CAZ Strategic Opportunities Fund: Seeks long-term capital appreciation and current income through broad exposure to innovative and predominantly private markets. The fund seeks exposure across multiple asset types, including private equity, private credit, real estate/real assets, and liquid assets.
- AngelList Asset Management's USVC Venture Capital Access Fund: Seeks long-term capital appreciation by investing in venture capital funds and underlying private growth-oriented companies with exposure across AI, fintech, healthcare, defense, and other innovation-driven sectors, which may include opportunities connected to the AngelList platform.

“SoFi is making alternative investing more accessible for investors looking to diversify their portfolios, but who have previously faced barriers to entry,” said **Anthony Noto, CEO of SoFi**. “We’re proud to expand our selection of investment opportunities across private equity, real estate, venture capital, and more, giving members more ways to diversify their portfolios and pursue their financial ambitions.”

This expanded offering provides SoFi Invest members with:

- **High-quality investments:** Strategies of this type have been historically out of reach for many. These funds include strategies investing directly in private companies or indirectly through other private market funds and investment vehicles.
- **Periodic Liquidity:** Unlike many traditional private investments, these funds intend to offer periodic, limited opportunities to have shares repurchased, giving investors greater flexibility to access their capital.
- **Low-friction experience:** Private market investing can be complex, with unfamiliar terminology and fund structures. SoFi helps simplify the experience through educational resources, transparent reporting, and a seamless investing experience within the SoFi app.
- **Lower minimums:** With minimum investments starting at \$500 for the USVC Fund and \$2,500 for the CAZ funds, investors can access private market strategies with lower capital requirements than many traditional private investments.

Over the past year, SoFi has expanded its private markets offering with additional funds from asset management firms including Cashmere, ARK Invest, and Liberty Street Advisors. Today's launch marks another step in broadening access to private market investing.

The new private market funds from CAZ Investments and AngelList Asset Management are now available to SoFi Invest members. Learn more in the SoFi app or visit <https://www.sofi.com/invest/alternative-investments/>.

About SoFi

SoFi Technologies (NASDAQ: SOFI) is the everything app for digital financial services on a mission to help people achieve financial independence to realize their ambitions. 15.8 million members trust SoFi to borrow, save, spend, invest, and protect their money and buy, sell and hold their crypto – all in one app – and get access to financial planners, exclusive experiences, and a thriving community. Banks, fintechs, and brands use innovative capabilities from SoFi Tech Solutions to serve over 134 million global accounts. For more information, visit www.sofi.com or download our iOS and Android apps.

Forward-Looking Statements

This press release contains forward-looking statements regarding the expansion of SoFi's private markets offering, the continued availability and anticipated characteristics of the Funds, and the anticipated benefits to members. These forward-looking statements are based on SoFi's current expectations and assumptions and are subject to risks and uncertainties that could cause actual results to differ materially from those expressed or implied, including risks related to the relevant Fund's ability to continue to offer and market such products; attract and retain investors; obtain or maintain required regulatory approvals, registrations, or exemptions; identify, source, and consummate attractive investment opportunities; manage investment performance and liquidity; and satisfy applicable legal, regulatory, tax, and contractual requirements; and to SoFi's ability to integrate new products into its platform; compete effectively with other private investment platforms; respond to changes in market conditions, interest rates, valuations, and investor demand for private market investments; and other risks that could affect the timing, availability, economics, or success of such offerings. You should carefully consider the foregoing factors and the other risks and uncertainties set forth in the section titled "Risk Factors" in SoFi's last annual report on Form 10-K as filed with the Securities and Exchange Commission, and those that are included in any future filings with the Securities and Exchange Commission. Statements regarding a Fund's investment objectives, target allocations, portfolio exposure, and intended share repurchases reflect current intentions only, are subject to the terms, conditions, limitations and risks set forth in the Fund's prospectus, and are not guarantees that such objectives, allocations, exposures or share repurchases will be achieved or occur. SoFi undertakes no obligation to update any forward-looking statement except as required by law.

Disclosures

INVESTMENTS ARE NOT FDIC INSURED • ARE NOT BANK GUARANTEED • MAY LOSE VALUE

SoFi Invest is a trade name used by SoFi Wealth LLC and SoFi Securities LLC offering investment products and services. Robo investing and advisory services are provided by SoFi Wealth LLC, an SEC-registered investment adviser. Brokerage and self-directed investing products offered through SoFi Securities LLC, Member **FINRA/SIPC**.

For disclosures on SoFi Invest platforms visit [SoFi.com/legal](https://sofi.com/legal). For a full listing of the fees associated with SoFi Invest please view our **fee schedule**.

The Funds are offered through SoFi Securities LLC on a self-directed basis, and no recommendation or investment advice is provided as to whether any Fund is appropriate for a particular investor. References to individual companies are illustrative of the sectors in which a Fund may invest and do not represent any Fund's current or complete holdings.

Registered Representatives of SoFi do not receive compensation for selling products or services available on any SoFi Invest platform. Information regarding financial products should not be considered an offer to sell, a solicitation to buy, or a pre-qualification for any product offered by SoFi or its affiliates.

Before investing, carefully consider the investment objectives, risks, charges, and expenses detailed in a Fund's prospectus. This document contains important information and must be read carefully prior to investing; you can find the current prospectus by clicking the link on the Fund's respective page.

Diversification can help reduce some investment risk, but cannot guarantee profit nor fully protect in a down market.

SoFi can't guarantee future financial performance, and past performance is no indication of future success.

Alternative investments are highly risky and may not be suitable for all investors. These investments often involve leveraging, speculative practices, and the potential for complete loss of investment. They typically charge high fees, lack diversification, and can be highly illiquid and volatile. Be aware that both registered and unregistered alternative investments, including closed-end funds and Interval Funds, are not subject to the same regulatory requirements as mutual funds, and their illiquid nature may restrict your ability to trade on your timeline. Always review the specific fee schedule for each fund within their prospectus.

Availability of Other Information About SoFi

Investors and others should note that we communicate with our investors and the public using our website (<https://www.sofi.com>), the investor relations website (<https://investors.sofi.com>), and on social media (X and LinkedIn), including but not limited to investor presentations and investor fact sheets, Securities and Exchange Commission filings, press releases, public conference calls and webcasts. The information that SoFi posts on these channels and websites could be deemed to be material information. As a result, SoFi encourages investors, the media, and others interested in SoFi to review the information that is posted on these channels, including the investor relations website, on a regular basis. This list of channels may be updated from time to time on SoFi's investor relations website and may include additional social media channels. The contents of SoFi's website or these channels, or any other website that may be accessed from its website or these channels, shall not be deemed incorporated by reference in any filing under the Securities Act of 1933, as amended.

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