



### **WFP Income Fund added to Charles Schwab Alternative Investment Platform**

Newport Beach, California – March 2, 2020 – Wilshire Finance Partners, manager of the WFP Income Fund (the “Fund”) today announced that the Fund has been approved for both retirement and non-retirement accounts on the Charles Schwab platform for Alternative Investments. The fund may be found under WFP INCOME FUND LLC.

The WFP Income Fund is now approved for both retirement and non-retirement accounts on the following alternative investment platforms:

- Charles Schwab; (SSDI Number available through an Advisor)
- Fidelity Investments (National Financial Services or NFS); CUSIP Number 94699K534
- Pershing as WFP INCOME FUND LLC; CUSIP Number 929LP9220
- TD Ameritrade as WFP INCOME FUND LLC NSA; CUSIP Number 93099B102
- Wells Fargo Advisors; No CUSIP required

In addition, the WFP Income Fund has been approved for self-directed retirement accounts on the following platforms:

- Community National Bank; CUSIP Number 11227
- Equity Trust Company (Sterling Trust) (no CUSIP required)
- Millennium Trust Company (with affiliate access to the Charles Schwab platform)
- Pensco Trust Company (no CUSIP required)
- Provident Trust Group (no CUSIP required)
- Strata Trust Company (no CUSIP required)
- Shareholder Services Group (no CUSIP required)



The WFP Income Fund is open to individual investors, wealth managers, registered investment advisors and institutional investors under the Fidelity, Pershing, Schwab, TD Ameritrade and Wells Fargo platforms using standard subscription and transfer procedures.

Individual investors may also invest directly with Wilshire, through their advisors or through the above platforms. Individual investors may be required to meet additional requirements of the platform providers.

“We are excited about our new relationship with Charles Schwab Company and the benefits it will provide to financial advisors and their clients,” said Don Pelgrim, CEO of Wilshire Finance Partners. “We value our relationships with Registered Investment Advisors and the addition of the WFP Income Fund to the Schwab platform increases the availability of the fund and provides more efficiency for RIAs and their clients.”

For more information on Wilshire Finance Partners or the WFP Income Fund please call (866) 575-5070 or visit [www.WilshireFP.com](http://www.WilshireFP.com).

#### **About Wilshire Finance Partners and our investment alternatives.**

Wilshire Finance Partners, Inc. (“Wilshire”) specializes in real estate finance and investments and is the manager of the WFP Income Fund, LLC (“WFP Income Fund”) and the WFP Opportunity Fund, LLC (“WFP Opportunity Fund” and collectively with the WFP Income Fund, the “Funds”). The WFP Income Fund invests in a diversified pool of residential, multifamily, and commercial real estate related short-term bridge loans secured by first trust deeds and mortgages. The WFP Opportunity Fund invests in a diversified pool of residential, multifamily, and commercial real estate related short-term bridge loans, participating loans, real estate joint ventures, and direct real estate investments. Wilshire commenced operations in January 2008 and launched the WFP Income Fund and the WFP Opportunity Fund in September 2013.

The WFP Income Fund is approved for both retirement and non-retirement accounts on the following alternative investment platforms:

- Charles Schwab; (SSDI Number available through an Advisor)
- Fidelity Investments (National Financial Services or NFS); CUSIP Number 94699K534
- Pershing as WFP INCOME FUND LLC; CUSIP Number 929LP9220
- TD Ameritrade as WFP INCOME FUND LLC NSA; CUSIP Number 93099B102
- Wells Fargo Advisors; No CUSIP number required

The WFP Opportunity Fund is approved for both retirement and non-retirement accounts on the following alternative investment platform:



- Charles Schwab; (SSDI Number available through an Advisor)
- Fidelity Investments (National Financial Services or NFS); CUSIP Number 94699B948
- TD Ameritrade as WFP OPPORTUNITY FUND NSA; CUSIP Number 93099C100

In addition, each of the WFP Income Fund and WFP Opportunity Fund are approved for self-directed retirement accounts and various other platforms without the need for the CUSIP number, including, Community National Bank, Equity Trust Company (Sterling Trust), Millennium Trust Company, Pensco Trust Company, Provident Trust Company, Strata Trust Company and Shareholder Services Group.

Each of the WFP Income Fund and WFP Opportunity Fund is open to investors, wealth managers and individual investment advisors under the above referenced platforms using standard subscription and transfer procedures.

Investors and advisors may also invest directly through Wilshire. Individual investors not using a third-party advisor may be required to meet additional requirements of the platform providers.

#### **Safe Harbor Statement**

This communication is not an offer to sell or the solicitation of offers to purchase the securities of either of the Funds, individual loan or trust deed investments, or otherwise (individually and collectively, the “Securities”). The purpose of this communication is to provide an overview of the respective Securities and their private placement. Persons interested in learning about the Securities and their private placement will be provided with the respective Private Placement Memorandum (inclusive of exhibits thereto and any supplements, the “Memorandum”), which provides a description of the Securities, the terms of their private placement, a discussion of risk factors, a copy of the limited liability company operating agreement for the fund (as applicable), a subscription agreement and other information related to the Securities.

This communication contains certain forward-looking statements regarding the Securities and the investment objectives and strategies of each of the Funds. The forward-looking statements are based on current expectations that involve numerous risks and uncertainties which are difficult or impossible to predict accurately and many of which are beyond the control of Wilshire, as the manager of the Funds. Although Wilshire believes that the assumptions underlying the forward-looking statements are reasonable, any of the assumptions could prove inaccurate and, therefore, there can be no assurance that the forward-looking statements will prove to be accurate. In light of the significant uncertainties inherent in the forward-looking statements, the inclusion of such information should not be regarded as a representation by Wilshire, any placement agent, or any other person, that the objectives and strategies of the respective Securities or the Funds will be achieved.

Investments in the Securities may only be made solely by accredited investors (which for natural persons, are investors who meet certain minimum annual income or net worth threshold), who are provided with the Memorandum and who complete, execute and deliver the subscription documents included therein.



Each of the Securities is being offered in reliance on an exemption from the registration requirements of the Securities Act of 1933, as amended (the Securities Act) and are not required to comply with specific disclosure requirements that apply to registration under the Securities Act. The Securities Exchange Commission has not passed upon the merits of or given its approval to the Securities, the terms of the offering, or the accuracy or completeness of any offering materials. Each of the Securities is subject to legal restrictions on transfer and resale and investors should not assume they will be able to resell the Securities. Past performance is not indicative of future results. Investing in any of the Securities, including the Funds, involves substantial risk, including loss of investment, and is not suitable for all investors.

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