

Capital Solutions to drive enterprise value. **Embrace the benefits!**



Build & Grow Advisor Financing

- Competitive rates
- No underwriting or origination fees
- No prepayment penalties
- No personal guarantees

Contact the Capital Solutions team at capitalsolutions@osaic.com.



Practice
acquisitions



Capital expenditures,
including office
real estate



Expanding your
employee base



Marketing
campaigns

What You'll Need

- Detailed business plan outlining sources and uses of funds
- Tax returns, 2 most recent years
- Entity income statements, 2 most recent years and interim
- Soft credit check pulled by Osaic

Contact capitalsolutions@osaic.com to get started.

Additional Options - Personal Credit Line

- Most competitive rates
- Quick access to cash
- 24/7 online portal
- Leverage portfolio assets

Contact us at personalcreditline@osaic.com or visit your firm's portal and search "lending".