

THE AdvisorEDGE



KEEPING YOU A STEP
AHEAD WITH INTEGRATED
BANKING SERVICES.

PREMIER LINE OF CREDIT IN ACTION:

Don't let clients miss opportunities because they lack liquidity.

Establishing a Premier Line of Credit now can help your clients be better prepared to take advantage of time-sensitive opportunities in the future.

THE PREMIER LINE OF CREDIT SOLUTION

When opportunities arise and clients need liquidity, they may need to act right away. Talk to your clients about opening a Premier Line of Credit today. Once they establish their line of credit, your clients may be better prepared to immediately take advantage of future opportunities.

SPEED TO LIQUIDITY – Once the application process is complete and the client has an open Premier Line of Credit, their line of credit is available for immediate use. When they need it, your client will have convenient and fast access to liquidity through check or wire - no additional approval is necessary.

MULTIPLE PURPOSES – A client can use their immediate liquidity for a multitude of purposes, including real estate purchases, educational expenses, starting/investing in a business, tax payments, buying assets (e.g. art, collectables) - even charitable contributions. The only thing a client may not use their line of credit for is the purchase of additional securities.



NO COST TO OPEN – There is no cost to open Premier Line of Credit – and it costs a client nothing until they use it. A client will only begin to owe interest on the amount borrowed when he or she begins using the line of credit.

MORE HOLISTIC ADVICE – You are providing valuable and practical information for your clients when you recommend that they open Premier Line of Credit. Preparing a client to be able to move quickly and not miss opportunities may increase your value as an advisor by demonstrating another way that you can support a client's complete financial picture.



Want to share this important information with your clients?

Click this image to download a client-ready edition of The AdvisorEdge or contact your Business Development team.

Premier Line Of Credit Fast Facts

- An interest-only revolving credit line backed by securities held in a client's investment portfolio.
- Provides access to funds while leaving you and your clients' investment strategies untouched.
- May help retain Assets Under Management (AUM).
- Competitive risk from banks can be reduced.
- Available to individuals, trusts and entities.
- Minimum line of credit of \$75,000, no minimum draw required.
- Conservative lending standards.

Contact your appointed Business Development team to learn more about how Premier Line of Credit can benefit both you and your client. Or, contact us at:

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www.premierlocinfo.com

Premier Line of Credit
SECURED LENDING PROGRAM

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