

WHY WORK WITH US?



- Confidence your clients will get financing tailored to their needs
- Build credibility with your clients
- Transparency – we keep you in the loop with progress updates on your clients files
- Focus on your business – We take care of your clients commercial financing needs, while you tend to your business.
- We manage the file from inception through funding – to ensure your deal closes

HOW WE CAN HELP YOUR CLIENTS

PURCHASES

- Consult with clients and lenders to best align requests based on client needs (ie. LTV, structure, interest rate)
- Leverage existing assets to maximize loan amounts
- Restructure debts to allow for larger acquisitions

REFINANCES

- Re-amortizing existing debts
- Non conventional structures including balloon payments and deferred principal repayments
- Working capital financing to free up cash flow

MORE WAYS WE CAN HELP

Lines of Credit for working capital

Small Business loans (CSBFL)

Inventory Financing

Equipment financing

Business Buyouts

Construction & Leasehold improvement financing

Professional practice (Doctors, dentists, lawyers, accountants, pharmacists)

IDENTIFYING OPPORTUNITIES

TRIGGERS

- Clients are not happy with their current financing arrangements or institution.
- Clients are using expensive financing
- Established businesses operating with private lender financing
- Clients are leveraging their homes to finance their businesses
- Clients are facing cash flow problems

WHO WE ARE

- Experts at commercial/business financing
- We have over 40 years of cumulative experience helping finance business
- We hold the clients hand from start to finish – until funds are in the Bank

WHAT WE DO

WE HELP CLIENTS OBTAIN:

- Lines of credit
- Equipment financing
- Mortgages – Purchases or Refinances
- We help find creative financing structures
- Construction and land financing
- Canadian Small Business Loans – guaranteed by the government
- Mergers & Acquisition loans for investors or management
- Financing during difficult periods/restructure loans
- Alternate financing – Factoring, Asset Based Lending
- Private Commercial Financing

HOW WE WORK WITH YOU

- You identify a client whose business needs financing
- We advise you on documents required from the client
- You make an introduction to the client in person or via email
- Client signs a NDA and a Client Services Agreement
- **Hand off complete**
- We keeps YOU in the loop throughout the process at key points including:
 - **TERM SHEET**
 - **COMMITMENT**
 - **FUNDING**
- YOU get a referral fee once the financing process closes
- We keep in touch with the client and provide regular guidance