



Welcome to Advisor Financing LLC., providing acquisition, partner-buyout, and or debt refinancing capital to financial advisors (FA), broker dealers (BD) and registered investment advisors (RIA).

We design and personalize our solutions specific to your needs and deliver the most advisor friendly terms and rates available. Our ability to offer both conventional and SBA loans, coupled with our comprehensive consulting approach, positions us as a premier lender for financial advisors. Our lending program was built by financial advisors for financial advisors.

Our goal is to secure financing that best fits your situation and needs. Our process begins with an initial discovery to learn about your practice and how best to position your financing needs to our lenders. We've created a highly efficient and friendly document gathering process that allows you to simply and securely drag and drop the information into your custom data vault. In as little as three weeks we can take you from the initial discovery to receiving a term sheet.

Below are the general terms of our lending program:

- Conventional and SBA solutions
- No collateral or down payment required for most loans
- Fixed rates as low as 5.5%
- Amortization periods generally 7-10 years
- Credit decision mainly based upon personal balance sheet and cash flow
- Partial seller notes are acceptable once approved by lender

### **BROKER DEALER/ RIA SOLUTIONS**

If you are a broker dealer or registered investment advisor we can create a recruiting and lending program specifically for your financial advisors. Creating solutions at the broker dealer level creates significant synergies, scale, and more favorable terms. Currently, \$2.3 trillion of assets under management are with advisors over the age of 60 (Investment News, Cerulli 2014). With so many advisors nearing retirement is your firm prepared to help attract and retain the next generation of advisors?

Troy Winegarner, CFP®  
CEO/ Founder

A handwritten signature in blue ink that reads 'Troy Winegarner'.

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