

Financial advisor lending services to get you where you're going



Growth requires capital

CWB Maxium Financial provides financing to corporations and professionals in the financial advisor and wealth management industries. Our commercial lending is tailor-made to accommodate every unique situation to support our clients in scaling their businesses, while managing cash flow to ensure sustainable growth.

Common areas we finance include acquisitions, refinancing, expansions, succession, and infrastructure. We provide financial solutions to help you build the future of your business.

Our financing is designed to meet the various business financing needs of our customers. Our industry experts arrange financing based on the cash flow generated by the business as we understand the inherent goodwill value created by strong, predictable cash flows. Based upon your current financial position and target objective, we offer competitive rates and structures.

CWB Maxium has the flexibility to create terms ranging from three to five years, amortizations of up to ten years and can incorporate step-up payments, postpone principal repayments, and structure staggered disbursements.

Funding options that fit your needs

To fund an acquisition, we look at the business cash flow to service the debt, typically based on three years of financial statements or the business owner's income tax returns. To size the loan, we take into account the borrower's and the acquisition targets net cash flow.

Financial advisor commercial lending

- Purchase a practice or a book of business
- Accelerate an acquisition for succession planning
- Buy out a partner or shareholder
- Purchase commercial real estate
- Dealer recruiting/acquisition programs and internal successional management

Connect with us

Please contact me to find out more about how I can help you meet your financing needs.



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OBSESSED WITH YOUR SUCCESS™

