

# GREENER PASTURES

Making the move to independence



When you're ready for "Greener Pastures" by making a career move to independence, count on The Bancorp Institutional Banking team to put you on the right path. Our Transition Services will help you navigate from your current firm while preserving those all-important client relationships.

As a leading provider of the Securities-Backed Line of Credit (SBLOC), The Bancorp can help you retain assets under management by offering the SBLOC to your clients who may need a loan payoff to move their investments.\*

## Managing your transition:

- ✓ A dedicated Business Development Officer works with you through the transition process.
- ✓ On a confidential basis, The Bancorp reviews all current loans and investment account statements, so you can be assured that your clients' existing loan amounts and pricing remain intact.
- ✓ A tenured team of underwriting professionals with strong industry relationships assists with the payoff process.
- ✓ The external loan payoff process is completed, allowing client assets to transfer to your new firm.
- ✓ New SBLOC clients receive a detailed welcome package. Online access to view SBLOC account activity is provided to both the client and advisory firm.

\*The SBLOC is a non-purpose loan, the proceeds of which cannot be used for the purchase of securities or to refinance a loan used to purchase securities.



## WORK WITH THE EXPERTS

50,000+ FINANCIAL ADVISORS SERVED

We focus on helping independent advisors:



expand their range of financial planning tools



strengthen client relationships



retain and grow client assets



## CONTACT US

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