

TAILORED FINANCING FOR CLIENTS

# LENDING SOLUTIONS

A dedicated lending desk for Sequoia Financial advisors — providing exceptional credit access across commercial, real estate, specialty, residential, and portfolio structures to support every financing need.

**Empower Your Advice. Deepen Your Relationships.**

Managed by Community Capital and offered exclusively to Sequoia Financial advisors, Lending Solutions connects you and your clients to a nationwide lending marketplace — combining broad reach, flexible structures, and concierge-level support. **You stay at the center of the relationship** while our team sources, structures, and coordinates the right credit, end-to-end.

**1,500+**

LENDER NETWORK

**\$250K-\$1B+**

LOAN SIZE RANGE

**50**

STATES SERVED

## SIX CORE SOLUTIONS | AT-A-GLANCE

## TYPICAL STRUCTURES, SIZES & SAMPLE USE CASES

**C&I · SBA 7(A)** **\$500K+**  
MINIMUM

**Commercial Lending**

- › C&I & working-capital lines
- › SBA 7(a) acquisition loans
- › Equipment & inventory finance
- › Business acquisition financing

**USE CASE** *A business-owner client funds an expansion or competitor acquisition without disrupting operating cash flow.*

**CRE · SBA 504** **\$500K+**  
MINIMUM

**Commercial Real Estate**

- › Acquisition & refinance
- › Multifamily & mixed-use
- › Construction & bridge
- › SBA 504 owner-occupied

**USE CASE** *An investor refinances a multifamily asset ahead of a rate reset, or an owner buys their own building.*

**AVIATION · MARINE · LUXURY** **\$10M+**  
UP TO

**Specialty Financing**

- › Aircraft & marine financing
- › Oil & gas
- › Fine art & collectibles
- › Franchise & unique needs

**USE CASE** *An executive purchases a yacht or aircraft on flexible terms without liquidating an investment portfolio.*

**STANDARD · JUMBO · PORTFOLIO** **\$20M+**  
UP TO

**Residential Mortgages**

- › Primary, vacation & refi
- › Portfolio & non-QM programs
- › Standard, jumbo, super jumbo
- › Asset-depletion & bank-stmt

**USE CASE** *A high-net-worth family buys a primary or vacation home despite complex or non-traditional income.*

**HOME EQUITY LINES** **\$5M+**  
UP TO

**HELOCs**

- › High-limit revolving access
- › Interest-only draw periods
- › Standalone or piggyback
- › Bridge & liquidity use cases

**USE CASE** *A client unlocks flexible liquidity against primary- or second-home equity to bridge a purchase, renovations or an investment.*

**PHYSICIAN · PROFESSIONAL SERVICES** **\$10M+**  
UP TO

**Physician & Practice Loans**

- › Physician mortgage programs
- › Practice buy-in & partnership
- › Acquisition & build-out finance
- › Equipment & working capital

**USE CASE** *A physician finances a partnership buy-in, or buys a home early-career with limited down payment.*

Ready to explore a solution?  
Start a confidential inquiry.

✉ [capitalsolutions@communityct.com](mailto:capitalsolutions@communityct.com) ☎ (866) 306-3365

**LEARN MORE** VISIT OUR DEDICATED SOLUTIONS PAGE TO LEARN MORE, SCHEDULE A CONSULTATION OR SUBMIT A LOAN INQUIRY



🌐 [lendingsolutions-sequoia.communitycapital.ai](https://lendingsolutions-sequoia.communitycapital.ai)

Lending Solutions is a program operated by Community Capital, made available to advisors of Sequoia Financial Group through a partnership between the two firms. Community Capital is not a direct lender; all loan products are subject to credit approval, underwriting guidelines, and lender availability. Investment advisory services are offered by Sequoia Financial Advisors, LLC, an SEC-Registered Investment Advisor; registration does not imply a certain level of skill or training. This material is for internal wealth-advisor use only and is not intended for distribution to clients. It does not constitute tax, legal, or investment advice. Sequoia and Community Capital have certain conflicts of interest due to this relationship; please see Sequoia's Form ADV for further information.