



Connecting Clients to a Holistic Lending Partner

At Sequoia Financial Group, we deliver a comprehensive, client-first wealth management experience that extends beyond investments, tax planning, and estate strategy and includes helping clients access the resources they need to achieve their broader financial objectives.

As part of that commitment, Sequoia has established a strategic partnership with Community Capital Technology, a third-party platform that facilitates lending solutions for clients across the wealth continuum.



ABOUT COMMUNITY CAPITAL TECHNOLOGY

Through Community Capital Technology, advisors can connect clients to a curated ecosystem of lending institutions to explore credit solutions aligned with their capital needs. Working with a nationwide network of more than 1,450 financial institutions, this platform provides efficient, on-demand access to a wide range of lending opportunities across both personal and business use cases.

This approach allows clients to benefit from:

- A broader range of potential lending options
- Increased efficiency in sourcing and evaluating opportunities
- Additional financing structures beyond the traditional, single-lender processes

An Advisor's Role

As an advisor, your role is to initiate a conversation with the client, frame their borrowing needs, facilitate with Community Capital Technology to explore solutions, connect the client to the appropriate resource, and guide them through closing and funding.

Comprehensive Service



NATIONWIDE ACCESS

to a large, diverse lender network for each credit opportunity



ROBUST OPTIONS

across loan types and lender profiles



EXPERIENCED GUIDANCE

through a structured, technology-enabled process



HIGH-TOUCH SUPPORT

designed to streamline outcomes for clients



STRENGTHENED CLIENT RELATIONSHIPS

by addressing a critical financial need within the broader wealth plan

Starting the Conversation

Initiating a lending discussion requires only a focused set of questions to identify client needs and determine fit.

KEY AREAS TO COVER	LOAN TYPE OPTIONS
<p>1 LOAN PURPOSE Intended use of proceeds</p> <p>2 LOAN SIZE Estimated capital need</p> <p>3 BORROWER PROFILE Individual or entity</p> <p>4 LOAN STRUCTURE Term preferences, rate expectations, collateral availability, guarantee considerations</p> <p>5 TIMING & CONTEXT Target closing date, existing lender relationships, any current term sheets</p> <p>Once defined, you are well positioned to connect with Community Capital Technology for evaluation and sourcing.</p>	<p>Below are examples of commercial and personal loans offered through Community Capital Technology.</p> <p>COMMERCIAL & SBA</p> <ul style="list-style-type: none">• Commercial real estate (purchase/refinance)• Business lending (working capital, expansion, acquisitions)• SBA loans for qualified businesses <p>RESIDENTIAL</p> <ul style="list-style-type: none">• Primary and vacation home financing• Refinancing solutions• Home equity lines of credit (HELOCs) <p>SPECIALTY</p> <ul style="list-style-type: none">• Aviation & marine financing• Franchise funding• Equipment financing• Niche opportunities (oil & gas, minerals, etc.)

Process Overview

Once a lending request is initiated through Community Capital Technology, it takes 5–8 weeks to complete the process, including sourcing, lender interest, and presentation of options. As the advisor, you'll remain informed every step of the way.

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