



Integrated Strategic Financing

At Sequoia Financial Group, we understand that important financial decisions often extend beyond investments, tax planning, and estate planning. Whether you're purchasing a home, expanding a business, financing commercial real estate, accessing liquidity, or exploring specialty financing opportunities, borrowing decisions can significantly shape your overall financial picture.

To help clients navigate these needs, Sequoia Financial Group has established a strategic partnership with Community Capital Technology, an independent third-party platform that connects borrowers with a nationwide network of lending institutions.



How the Partnership Works

Community Capital Technology works with more than **1,500 financial institutions across all 50 states** to help identify lending solutions tailored to your specific needs. Rather than approaching individual lenders one at a time, you gain access to a broad marketplace of financing options through a streamlined process designed to save time and expand opportunities.

Financing Solutions May Include:

RESIDENTIAL LENDING (UP TO \$20M)

- Primary residence financing
- Vacation and second homes
- Refinancing opportunities
- Jumbo and specialty mortgage programs

HELOCs (UP TO \$5M)

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

BUSINESS & COMMERCIAL LENDING (\$500K+)

- Commercial real estate acquisition and refinancing
- Business expansion financing
- Working capital solutions
- Equipment financing
- SBA lending programs
- Business acquisition financing

SPECIALTY LENDING (UP TO \$10M)

- Aircraft financing
- Marine financing
- Franchise funding
- Specialty asset financing
- Other unique lending needs

PROFESSIONAL & PHYSICIAN FINANCING (UP TO \$10M)

- Physician mortgage programs
- Practice acquisition financing
- Partnership buy-ins
- Practice expansion and equipment financing

The Value of an Integrated Approach

A lending decision rarely exists in isolation.

Financing a real estate purchase, acquiring a business, accessing liquidity, or funding a major life event can impact investment strategy, cash flow, tax planning, estate planning, and long-term financial goals.

Your Sequoia advisor can help ensure these decisions are evaluated within the context of your broader wealth management strategy while coordinating introductions to Community Capital Technology when lending solutions may be appropriate.

What You Can Expect



**Access to a nationwide
network of lending
institutions**



**A broad range of
financing structures
and solutions**



**A streamlined and
confidential evaluation
process**



**Coordination
with your overall
financial plan**



**Ongoing communication
throughout the lending
process**

Investment advisory services offered by Sequoia Financial Advisors, LLC, an SEC Registered Investment Advisor. Registration as an investment advisor does not imply a certain level of skill or training. Sequoia Financial Group and its affiliates are not lenders and do not originate, underwrite, or approve loans. Lending solutions are provided through Community Capital Technology and participating third-party lending institutions. All financing is subject to lender approval, underwriting requirements, credit qualifications, and lender availability. Your Sequoia advisor's role is to help coordinate the conversation and ensure lending decisions are considered within the context of your overall financial plan.