

The BancorpTM

SBLOC

An Innovative Lending Solution
for Advisors and Clients



A Securities-Backed Line of Credit (SBLOC) lets your clients tap the value of their investments without disrupting their portfolios.

- An interest-only revolving credit line backed by non-qualified securities held in the investment account.
- Available to individuals, trusts and entities.
- No income verification for individuals, joint accounts or trusts.
- Minimum credit line of \$75,000.¹
- No application fee,² no annual or monthly fees.
- No charge for portion of line not in use.
- May help avoid the potential tax consequences of liquidating assets.³
- Simple application and underwriting process.

USES MAY INCLUDE:



Real estate investment



Non-purpose loan payoff



Estate settlement



Business investment/costs



Taxes



Tuition



Other liquidity needs⁴



CONTACT US

Phone: 877.743.4321

Email: sblocinquiry@thebancorp.com

Web: cashadvantageoverview.com

¹ Minimum may vary by state. Please discuss with your financial professional.

² The Bancorp Bank does not charge an application fee. State, local, and/or third-party fees may apply in some states.

³ Consult a financial/tax professional regarding potential tax implications involving your investment portfolio.

⁴ An SBLOC cannot be used for the purchase of additional securities or to pay off a margin loan that was used to purchase securities.

Securities-based lending has special risks and may not be suitable for everyone. To help maintain the security of financial information, do not include confidential personal information such as account numbers or Social Security numbers in non-secure email correspondence.

Cash AdvantageSM is a service of AssetMark Trust Company, an Arizona trust company. Banking services, including Cash Advantage, are provided by The Bancorp Bank. AssetMark Trust Company and The Bancorp Bank are separate and unaffiliated companies.