






CLIENT

It Pays to Pay Taxes with an SBLOC.



A Securities-Backed Line of Credit (SBLOC) can be a cost-effective way to pay your taxes without the need to liquidate some or all of your investment portfolio.

PAYING WITH CASH FROM AN SBLOC COULD MAKE TAX TIME MUCH LESS TAXING FOR YOU:

-  With the SBLOC's simple application and quick turnaround process (as well as no application, set-up or annual fees), you can quickly establish a line of credit, giving you easy access to cash for taxes and other expenses.¹
-  By drawing on a line of credit instead of selling assets, you may eliminate the potential tax consequences of liquidating assets.
-  You are only required to make a monthly interest payment. With no set principal repayment deadline, you can create your own principal repayment schedule or use earnings to pay down your SBLOC balance.

For more information, or to determine whether an SBLOC is right for you, contact your financial professional or [CLICK HERE](#).

1. Securities-based loans offered through The Bancorp Bank (Bank) cannot be used for the purchase of securities or to pay off a margin loan that was used to purchase securities. Subject to credit approval and underwriting. The Bank does not charge an application fee. State, local, and/or third-party fees may apply in some states.

Securities-based lending has special risks and may not be suitable for everyone. If the market value of your pledged securities declines below required levels, you may be required to pay down your line of credit or pledge additional eligible securities in order to maintain it, or the lender may require the sale of some or all of your pledged securities. The sale of your pledged securities may cause you to suffer adverse tax consequences.

The Bancorp Bank does not offer tax, legal, or investment advice. AssetMark and its affiliates do not offer tax or legal advice. You should consult with your financial professional(s), as necessary.

Please remember that information sent to us via email is sent over a non-secure network. Do not include confidential personal information such as account numbers or Social Security Numbers in any non-secure communication.