



Financial advisor lending services to get you where you're going



Welcome to CWB Maxium Financial

Specializing in mid-market lending since 1993, CWB Maxium Financial is a leader in providing creative financing of up to \$50 million to businesses across Canada. We joined CWB Group in March 2016, significantly expanding our funding capabilities and access to capital, which allows us to help more customers in more ways, and takes us to another level of service, performance, and growth.

Today, our financial portfolio exceeds \$1 billion, and our client base includes over 35,000 customers across 19 markets. We are active, present and engaged in the markets we finance including healthcare, golf, condo and strata, renewable energy, and corporate and program financing. Now we are excited to announce our newest division – financial advisor lending.



Growth requires capital

CWB Maxium Financial lends money to independent financial advisors. Our advisor lending program is designed exclusively for independent agents and financial planners interested in scaling their practice, allowing our customers to expand capacity while managing cash flow to ensure sustainable growth.

Common areas we finance include acquisitions, refinancing, expansions, succession, and infrastructure. We provide financial solutions to help you build the future of your business.

Our program adapts to meet the various business financing needs of our customers. Our industry experts arrange financing based on business cash flow rather than collateral. We offer competitive rates and recommend structures based on your financial position and objectives.

Financial advisor lending program

- ▶ Purchase a practice or a book of business
- ▶ Accelerate an acquisition for succession planning
- ▶ Buy out a partner or shareholder
- ▶ Purchase commercial real estate
- ▶ Harness your equity
- ▶ Finance leasehold improvements
- ▶ Buy agency management systems or equipment

CWB Maxium has the flexibility to create terms ranging from three to five years and amortizations of up to 10 years and can incorporate step-up payments, postpone principal repayments, and structure staggered disbursements.

Funding options that fit your needs

To fund a project, we look at business cash flow to service the debt, typically based on three years of financial statements or the business owner's income tax returns. To maximize the loan, we take into account the borrower's and the acquisition target's net cash flow. Our funding options often include vendor take-backs.

Connect with us

Contact me to find out more about how I can help you meet your financing needs.

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Trusted partner. Experienced lender.

