



CAPITAL. PARTNERSHIP. RESOURCES.



# >> WE UNDERSTAND YOUR BUSINESS

You've worked hard to build your business. Really hard.

As Registered Investment Advisors and Individual Advisory Representatives, your clients rely on you to help them achieve their dreams. But don't forget about your own. Doesn't it make sense to work with a partner who specializes in lending to your industry, one who provides a relationship-based approach and has the capital you need to support your practice today, and your successes tomorrow?



Registered Investment  
Advisors



Individual Advisory  
Representatives

# >> FINANCIAL SOLUTIONS TO FIT YOUR NEEDS

Your firm can be the best- and remain the best- with strategic moves that will help you win. When you need a business loan, Oak Street Funding offers a variety of financial solutions, customized to meet your business needs.



## ACQUISITION

Leverage our acquisition funding as a great way to increase business beyond organic means

## SUCCESSION

We help existing owners make well-deserved financial exits while positioning future owners for long-term success

## TRANSITION

If you have a dream of starting a firm, our transition loan can help new business owners, with an existing book of business, achieve their dreams.

## BUSINESS DEBT RESTRUCTURE

Consolidate existing loans, reduce debt obligations, clean up your balance sheet, and improve liquidity

## WORKING CAPITAL

Get a business capital loan to propel your business forward by hiring an employee, upgrading technology, or launching new marketing campaigns

# >> HOW WE CAN HELP YOUR BUSINESS



## EXCEPTIONAL EXPERIENCE

Leading with each client's best interests in mind has led to above-average Net Promoter Scores (92) and Best Places to Work awards.



## PEACE OF MIND

Oak Street Funding is well-capitalized to meet your lending needs regardless of where you are in your business life cycle.



## SMART BORROWING

Our loans are customized to fit your business needs and are non-SBA so you can keep personal assets separated from your business.



## ALWAYS CONNECTED

Stay connected throughout the loan process with our easy-to-use software and in-house Sales, Underwriting and Servicing teams.



## ACCESS TO LEADERSHIP

Directly reach our CEO and Executive Team anytime should you ever have questions about financing options.


# >> SATISFIED CUSTOMERS



It's hard to truly understand what we, as business owners, are doing, and what I was trying to achieve from a capital infusion. So I appreciate Oak street Funding being instrumental in completing this.

I would absolutely recommend Oak Street Funding to a colleague if their needs align. I would push for them to talk to Oak Street. I don't know anyone else who loans on cash flow.



For our first funding, we gave Oak Street Funding a difficult deadline to close in three weeks...most lenders would not be able to do this, but Oak Street made it happen. 

# >> PARTNERSHIP FOR SUCCESS

We understand your industry, your business needs and your opportunities. No matter where you want to take your business, we have the experience and capital you need. Partner with Oak Street Funding and, we'll get you there.

---

**\$55.0M**

Acquisition

<p><b>\$25.0M</b></p> <p>Business Debt Restructure</p>	<p><b>\$20.0M</b></p> <p>Acquisition</p>
<p><b>\$13.1M</b></p> <p>Transition, Shareholder Buyout</p>	<p><b>\$5.5M</b></p> <p>Acquisition</p>
<p><b>\$3.1M</b></p> <p>Acquisition</p>	<p><b>\$2.6M</b></p> <p>Transition, Shareholder Buyout</p>



CALL US AT **844.343.1396** OR VISIT US AT  
**OAKSTREETFUNDING.COM** TO LEARN MORE.