



INVESTMENT ADVISOR FINANCING

Our team of investment advisor financing experts understand this unique industry, inside and out. We want to invest in you whether you're looking to buy or sell a business, refinance an existing loan or hire a new producer. Beyond the traditional banking experience, we strive to be an asset to our customers by turning obstacles into opportunities. Let our team confidently guide you through the lending process and craft a unique plan that will help you and your business thrive.

Why Live Oak



Industry experience & expertise



Speed & flexibility



Service & guidance

Benefits of Working With Us

- Favorable terms
 - Up to 10-year fully amortizing loan for business loans (succession, acquisition, partner buy-in, working capital, recruiting and more)
 - Up to 25-year fully amortizing loan for real estate purchases and/or construction
 - Several loan structures to choose from (SBA and non-SBA)
- Dedicated support throughout the life of the loan
- Efficient and collaborative lending process
- Competitive pricing

Project Types

- Acquisition
- Succession
- Partner buy-in
- Refinance
- Real estate
- Working capital

What We Need to Get Started

- Three years of business and personal tax returns
- Loan application and related documents
- Year-to-date income statement and current balance sheet
- Detailed description of business

“
Financing, coupled with a team of experts structuring the most favorable terms, allowed me to be successful out of the gate. That combination was a key factor in selecting Live Oak as my lending partner.”

- Charlie Gillespie
Principal & Financial Advisor
Litton Financial, LLC

To learn more or to contact a member of our team, visit liveoakbank.com/ia