ASSET-BASED FINANCING

Stock and Bond Line of Credit

Better Financing Secured by Your Stock Portfolio Alone



A unique line of credit based on your stock and bond portfolio. This versatile line of credit is a securities-based lending solution designed for business owners, commercial real estate investors and franchise owners to leverage acquisitions or grow their businesses.

The total value of your portfolio is only used as collateral for the loan, and as the basis for the credit line. The LOC gives access to capital without triggering a sale of any appreciated assets in your portfolio, making it a very tax-efficient option.

Stock and Bond Line of Credit Benefits

- **Secure Lending**
  Transfer of title is not required to get access to this type of funding. Our partners are fully licensed SIPC/FINRA institutions on Wall Street.
- **Fast and Efficient**
  Funding can be made available from your new line of credit in 7 days.
- **Repayments**
  Do not show up on your credit record and therefore do not affect any other loans you may have in place.
- **Affordable Access**
  Your stock portfolio continues to gain interest, dividends and potential appreciation. Rates on this line are interest-only and fall between the WSJ prime rate and a point over.
- **No Personal FICO Score Required**
  Your credit score does not determine the size of the loan or the rate.

Features

- Performance-based line of credit that grows with your portfolio
- No loss of ownership, trading restrictions or title transfers

CASH
Up to 90% LTV

BONDS
Up to 85% LTV

STOCKS
Up to 80% LTV

- High-end assets (luxury automobiles, watercraft and aircraft) can be used

PORTFOLIO MINIMUM
$85,000

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Basic Criteria

Wide range of securities are eligible for financing, including stocks, bonds, mutual funds and REITs.

- Stocks, bonds or mutual funds must be free-trading and belong to you
- Securities cannot be private — must trade publicly on a major stock exchange
- Securities must trade at an average of $3/share or higher
- **Portfolio minimum**
  $85,000
- No FICO score required

Advantages of SBLOC vs. Stock Margin Loans

- Lower interest rate
- Receive up to 80% of portfolio value vs. 50% on margin loans
- Proceeds can be used for any legal business purpose other than buying more stock
- No administration, management or service costs

Why Work with Eagle Bend Capital Financing?

Eagle Bend Capital Financing offers the financing you need, when conventional lending sources cannot. We work with a broad network of lending partners to help businesses secure flexible working capital solutions tailored to their needs.

Get Started

If you would like to learn more about our Stock Portfolio Financing program, or any of our other product solutions, contact us today.

QUESTIONS? GIVE US A CALL

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