ASSET-BASED FINANCING

Structured Settlement & Annuity Financing

Unlock Your Future Assets Today



This unique program allows clients with life insurance policies, alternative assets and other financial products (annuities) to convert future payment streams and assets into a lump sum payout. It gives you the option of selling however much of your monthly annuity or settlement payments you want. Best of all, our specialized partners can offer better buy-out options without the fear of facing high surrender charges.

All you need to do to obtain an initial quote is provide us with your payment schedule, monthly amount, policy, and in-force illustrations you receive from the insurance company or financial firm administering the fund. Typically, clients selling can expect to receive payout funds in two to four weeks.

Common Reasons Clients Sell

- Change in employment status
- Relieve financial stress
- Insurance premiums become too expensive
- Cash-out inherited contracts
- Retirement estate planning
- Seeking additional retirement income
- Unexpected medical or long-term care expenses

Annuities and Assets Clients Can Potentially Liquidate

Eligible policies and contracts range from $250,000 to $50 million. Individual, business or trust-owned.

Structured Settlements (Alternative Assets)

- Life Insurance Policy Settlements (UL, VUL, IUL, GUL and Whole Life insurance)
- Lottery Wins or Contest Awards
- Attorney Fee Deferrals and Periodic Payments
- Royalties
- Music Catalogs
- Sports Contracts
- Cell Tower Rights
- Oil/Mineral Rights
- Billboard Leases

Annuities (Qualified or Non-Qualified)

- Fixed Index Annuities
- Single Premium Immediate Annuities (SPIAs)
- Guaranteed and Life-Only Annuity Payments
- Deferred Annuities in Payout or with Income Withdrawals

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Business Notes with Collateral – WealthBuilder Tax Deferred Option

Sellers can enter into a purchase agreement to sell qualifying assets and take proceeds in the form of an installment obligation. The seller self-directs the asset allocation, chooses the investment menu and installment schedule, and the buyer assigns the obligation to WealthBuilder. WealthBuilder manages the account and makes installment payments to the seller.

- **Payment Guaranteed**
  Each payment due under the obligation is backed by a corporate guarantee issued by Raymond James.
- **Installment Obligation**
  The seller manages the timing of cash flows for retirement or other purposes, while also deferring the taxes that would otherwise be due upon the sale of the business.

Typical Qualifying Assets:

- Real Estate Business Property
- Business Assets – Equipment, Inventory and A/R
- Other Assets – Company Stock

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 Structured Settlement and Annuity Financing, or any of our other product solutions, contact us today.

QUESTIONS? GIVE US A CALL

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