

WEALTH BANKING SERVICES

Enhance your practice with the U.S. Bank Flexible Capital Platform[®]

Liability management represents an important opportunity to grow your practice. The U.S. Bank Flexible Capital Platform[®] makes it easier than ever for you to help clients leverage the power of their balance sheets, allowing them the liquidity access they need, when they need it. The Flexible Capital Platform provides you online access to powerful tools that let you illustrate different lending options, propose solutions and closely monitor the approval process.

The experience begins with accessing the Flexible Capital Platform which is launched conveniently from your desktop. Your entitlements to our proprietary lending platform allow you to efficiently manage your client needs while remaining in full control of the experience. You'll have the ability to:

- **Search and select accounts** to instantaneously download an illustration to share with your clients
- **Complete the application process entirely online** concluding with an e-consent from your client
- **Monitor the status of the approval process** through the Advisor Dashboard to manage your pipeline and the process to set proper expectations with full transparency
- **Access dedicated support** from the Wealth Banking Services team for assistance throughout the process, as well as deal/scenario discussions and structuring
- **Proactively plan** by establishing a U.S. Bank Flexible Capital Line of Credit[®] for clients who may want instant access to funds in the future
- **Monitor loans in force** to identify loans close to or in a call. Drill down in accounts to determine the advance amount for each asset
- **Model what-if scenarios** to calculate the borrowing power of assets held away or in ineligible accounts
- **Manage service requests** for collateral releases, draws, loan modifications, payoffs and more can now be initiated through the platform

us bank Calculate borrowing capacity Start application Learn more Service requests Contact us 1-Month CME Term SOFR: 0.06% As of 09/14/2021

U.S. BANK FLEXIBLE CAPITAL PLATFORM[®]
Liability management for your practice

Welcome Back 2 Open service requests

Start a new application Calculate borrowing capacity Model what if scenarios



The Flexible Capital Platform lets you retain control of client accounts while still providing them with convenient access to credit. It's a powerful tool that will help you successfully incorporate credit services into your practice. You'll be in a more competitive position as you work with existing and potential new clients.

Put us to work for you and your clients

Contact us today to gain access to the Flexible Capital Platform, explore our lending services or to discuss financing options for a specific client need.

U.S. Bank Wealth Banking Services
800-213-2330 | wealthbanking@usbank.com
usbank.com/wealth-banking



U.S. Bank Flexible Capital Line of Credit®: Loan approval is subject to credit approval and program guidelines. Not all loan programs are available in all states for all loan amounts. Interest rate and program terms are subject to change without notice. Credit products are offered through U.S. Bank National Association. Equal Housing Lender. U.S. Bank and its representatives do not provide tax or legal advice.

Suitability Notice: The U.S. Bank Flexible Capital Line of Credit® is a line of credit secured by a pledge of assets in a securities account. There are certain risks associated with securities backed demand lines of credit that would apply and there are certain limitations that would apply to the use and availability of the assets held in the account serving as collateral. As such, the U.S. Bank Flexible Capital Line of Credit® may not be suitable for all applicants.

©2022 U.S. Bank WMUSB-2020G 884102 CR-21503684 (12/22)