



**customers  
bank**

# Financial Institutions Group

With more than 50 years of combined banking experience, the Customers Bank Financial Institutions Group (FIG) delivers high-tech, high-touch service to a broad range of clients in the financial services industry, helping them to grow and operate their businesses more efficiently. With team members based in New York, Chicago and Dallas, the FIG team serves customers anywhere in the US.

- Experienced team of bankers and former industry professionals that understand your industry and provide focused, personalized service
- Full suite of banking and financial services including lending, payments and cash management solutions
- Mobile, online and integrated commercial banking services
- Nationwide network of offices, operations centers and branches

Our unique, relationship-based “single point-of-contact” approach gives our clients a dedicated team that is committed to meeting their needs, both now and in the future.

- Among 100 largest banks in America by assets and market capitalization
- Ranked 21st on Forbes “Best Banks in America” 2022 list

## CONTACT

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## Financial Institutions Group Services

### Industries Served:

- Securities Broker Dealers and Futures Commission Merchants
- Independent and Registered Investment Advisors
- Trust Companies
- Insurance Companies
- Third Party Administrators
- Banks
- Financial Technology (Fintech) Firms

### Innovative Deposit Solutions:

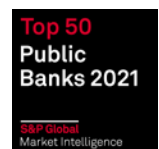
- FDIC insured sweep options
- SEC 15c3-3 Customer/PAB Reserve and Fully Paid Lending collateral accounts
- CFTC 1.20 and 30.7 segregated funds accounts
- Specialty accounts for Banks, Credit Unions, and other Financial Institutions

### Specialized Lending Capabilities

- General purpose secured revolving credit facilities that provide liquidity and financial flexibility
- Targeted broker dealer facilities to meet short-term NSCC spikes, 15c3-3 timing differences and other day-to-day liquidity needs
- Fully digital, tech-forward, securities-based lines of credit that allow financial advisor's client to access liquidity quickly without disrupting their investment strategies
- M&A and succession financing for RIAs and independent advisory firms with an eye toward the future of their practice

### Cash Management Services

- Online and Mobile Banking ACH & Wire Transfers
- Instant Payments
- SWIFT Messaging
- Integration with ERP/ERM and Treasury Workstations
- Integrated Receivables Solutions
- Fraud Protection
- Corporate Card, including T&E and Procurement Cards
- Remote Check Deposit & Lockbox Services
- Digital Asset Capabilities



**Let's Take On Tomorrow.**

www.customersbank.com

NYSE: CUBI

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