



# Innovative Solutions for RIAs

Getting you and your clients further, faster

The **Customers Bank Financial Institutions Group (FIG)** is here to serve financial professionals, not compete with them. From community banks to independent RIAs, we've built a flexible, advisor-friendly banking experience that supports your business, your clients, and your reputation.

Our team brings decades of experience working with financial firms and a clear understanding of what advisors need from their bank: a relationship-driven resource, innovative products, and no competition for your clients' assets. At Customers Bank, we deliver comprehensive, cost-effective solutions for every stakeholder of your ecosystem—from your practice, to your clients.

## Solutions to Accelerate Your Firm's Growth

- **General Purpose Revolving Credit Facilities** providing liquidity and financial flexibility
- **M&A & Succession Financing** to propel your firm's growth or transition to a future generation of advisors
- **Bridge Loans** to manage cash flow between quarterly fee payments
- **FDIC-Insured Sweep Options** to reduce risks on your reserve cash
- **Comprehensive suite of banking services** to optimize cash flow and reporting, and streamline operations

## Solutions to Accelerate Your Client's Growth

- Streamlined **Securities Based-Loans** for quick liquidity against client portfolios allowing effective management of short-term cash needs without needing to sell securities
- Access to the **Save Market Savings Sub-Advisory Program**, an innovative solution combining FDIC-insured bank deposit safety and the potential for market returns

## Complementary Services for Your Clients & Beyond

Mortgages | Community Banking | SBA Loans | Commercial Lending | Specialized Banking | Day-to-Day Banking Needs

## FIG's Dedicated RIA Coverage



**Jake Danielski**  
Managing Director



**Tyler Scallorn**  
Senior Vice President



**Bill Cassidy**  
Senior Vice President

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to get started