

BANKING BUILT FOR

Financial Advisors

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
- Insured Sweep Options to protect large deposits with expanded FDIC coverage while maintaining liquidity and easy access to your funds
- Comprehensive suite of banking services to optimize cash flow and reporting, and streamline operations

Solutions to accelerate your clients' growth

- Securities Based-Lines of Credit providing liquidity from your investment portfolio without selling securities, with a streamlined digital experience and competitive rates
- 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
- Commercial Lending
- SBA Loans
- Specialized Banking
- Day-to-Day Banking Needs

Bankers with the *expertise* to power yours.

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LET'S TAKE ON TOMORROW.