

# Residential Mortgages

Jumbo, super-jumbo, and portfolio loans for high-net-worth clients

150+

LENDING PARTNERS

50

STATES LICENSED

\$20M+

MAX LOAN SIZE

Sequoia's residential lending platform gives advisors direct access to an institutional lender network — delivering competitive, customized mortgage solutions for clients with complex income profiles, multiple properties, and non-standard financial situations.

## LOAN PRODUCTS

### Jumbo & Super-Jumbo

Loan amounts from \$1M to \$20M+ for primary residences, vacation properties, and investment homes — structured to your client's balance sheet and income profile.

### Portfolio Loans

Non-conforming loans held in-house, offering flexible underwriting for clients with complex income streams, multiple properties, or unique asset structures.

### Expedited Closings

White-glove processing with dedicated underwriters ensures competitive timelines, even on complex transactions requiring additional documentation.

### Nationwide Coverage

Licensed in all 50 states with lender relationships across the country, including markets with unique regulatory and underwriting requirements.

## KEY ADVANTAGES

- Access to 150+ lending institutions including private banks and portfolio lenders
- Single point of contact for advisor and client throughout the entire process
- Dedicated support for clients with foreign income, self-employment, or trust structures
- Competitive rates sourced through our broad lender network — not available through retail channels
- Transparent communication at every stage — no surprises, no delays

## CASE STUDY

### Jumbo Purchase — \$4.2M Primary Residence

A tech executive with equity-heavy compensation and a complex tax profile needed a \$4.2M jumbo mortgage on a new primary residence. Sequoia sourced a portfolio lender offering flexible income documentation, closing in 28 days.

## IDEAL FOR / USE CASES

- > Vacation & second homes
- > Primary residence purchases
- > Investment properties
- > Complex income clients
- > Foreign nationals
- > Multi-property portfolios

Lending Solutions Team

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