

JUMBO & PORTFOLIO

Residential  
Mortgages

Up to \$20M+  
Loan Amounts

- Jumbo & super-jumbo purchase
- Portfolio & non-QM programs
- Asset depletion & bank-stmt
- Foreign national eligible
- Rate-lock flexibility

IDEAL FOR

High-net-worth clients with complex income or large primary/vacation purchases.

HOME EQUITY LINES

HELOCs

Up to \$5M+  
Line Amounts

- High-limit revolving access
- Interest-only draw periods
- Standalone or piggyback
- Bridge & liquidity use cases
- Competitive rate structures

IDEAL FOR

Clients seeking flexible liquidity against primary or second-home equity.

C&I · SBA 7(a)

Commercial  
Lending

\$500K+  
Minimum Loan

- C&I & working capital lines
- SBA 7(a) acquisition loans
- Equipment & inventory finance
- Owner-occupied real estate
- Business acquisition financing

IDEAL FOR

Business-owner clients needing growth capital, acquisitions, or operational credit.

CRE · SBA 504

Commercial  
Real Estate

\$500K+  
Minimum Loan

- CRE acquisition & refinance
- Multifamily & mixed-use
- Construction & bridge loans
- SBA 504 owner-occupied CRE
- Secondary market eligible

IDEAL FOR

Investors and business owners acquiring, refinancing, or developing commercial property.

PHYSICIAN · LUXURY ASSETS

Specialty  
Financing

Up to \$10M+  
Loan Amounts

- Physician & professional loans
- Practice buy-in & partnership
- Aviation & marine financing
- Luxury & exotic vehicles
- Fine art & collectibles

IDEAL FOR

Physicians, professionals, and clients financing high-value lifestyle or practice assets.

SECURITIES-BACKED LINES

SBLOCs

\$250K+  
Minimum Line

- Non-purpose revolving credit
- No liquidation required
- Tax-efficient liquidity access
- Eligible: stocks, bonds, ETFs
- Rapid approval & funding

IDEAL FOR

Clients needing liquidity without disrupting a diversified investment portfolio.