CORIENT LENDING SOLUTIONS

At Corient, we understand how important—and how complicated—it can be to find the right lending solutions, especially for more sophisticated, non-standard financing needs.

As part of our goal to deliver the highest level of excellence to our clients, we offer a white glove service that assists in finding the right lender for our clients' specific needs. By tapping into our network of national, international, local, and niche lenders, we aim to find unique debt solutions and the most competitive rates to meet even the most complex of credit challenges.

Comprehensive White Glove Service

From helping choose the best loan type for the situation at the outset to answering questions and providing documents on your behalf during underwriting, the Corient Lending Solutions team will be with you every step of the way to ensure a smooth process. Relying on Corient offers you a number of advantages:

Unique Understanding

With in-depth knowledge of your balance sheet and portfolio, we can prepare an analysis to help you understand the level(s) of financing a lender may approve. Surprises are kept to a minimum due to our experience with the innerworkings of lender underwriting guidelines.

On Your Terms

To provide optionality for our clients, we can help secure a wide array of terms for each loan request, whether the preference is best rate, maximum loan size or something else entirely. In addition to obtaining scenario-specific terms, our team keeps a pulse on the everchanging rate environment by periodically gathering a rate snapshot from lenders.

A World of Options

We have a network of national, international, hyper-local and niche lenders to help meet any and all loan requests. You can rely on our experience to help zero in on the lender who best fits your unique situation.

Areas of Focus

- Artwork financing
- Aircraft and yacht financing
- Business loans
- Private stock lending
- Residential and commercial mortgages of $3,000,000 and above *(or the client/property has unique characteristics)*
- General and limited partner loans
- Secured and unsecured loans and lines of credit
- Construction and renovation loans
- Securities based lines of credit
- HELOCs above $1 million *(or the client/property has unique characteristics)*

For more information about Corient Lending Solutions, please contact your Wealth Advisor.

Corient At-a-Glance

Corient is one of the largest integrated fee-only RIAs in the United States. Our partnership model was designed to foster professional collaboration and a relentless focus on client excellence. As fiduciaries, we put our clients first and at the center of everything we do. And as a firm, we focus on exceeding expectations, simplifying lives and establishing lasting legacies.