

January 2017

Make Tax Time Less Taxing For Clients

SEI New ways.
New answers.®

When you recommend that a client use a Securities-Backed Line of Credit (SBLOC)* to pay their tax bill, they can benefit – and so can you.

Benefits of an SBLOC for your client:

- Provide needed cash for not only tax season, but all year long for other expenses.
- The carefully-crafted investment strategy of their portfolio remains intact.
- The potential tax consequences of liquidating assets may be avoided.
- Easy access to cash through wire transfers or SBLOC checks.
- Simple application process.
- No application, set up or annual fees.**
- Client makes interest-only payments, with no set principal repayment deadlines.
- Competitive interest rates.

Benefits of an SBLOC for you:

- By keeping your client's assets in place, you won't disrupt their investment strategy or your advisory fees.
- Introduction of an alternative liquidity option during quarterly meetings with clients.
- By offering options to your clients, you may save them time and money and be seen as an even more trusted advisor.
- Winning the trust of more of your clients can lead to more client referrals.

For more information, or to determine whether an SBLOC is right for your client, contact your SEI representative at 800-734-1003.

Your client should consult a tax professional for any questions regarding potential tax implications involving their investment portfolio.

** All Cash Access Account deposit and credit products are offered by and any accounts opened in connection with such products will be held by, The Bancorp Bank, a state-chartered bank which is unaffiliated with SEI Investments Company. Deposit accounts are maintained by The Bancorp Bank. They are FDIC insured up to \$250,000. Other accounts that you have at The Bancorp Bank may impact your coverage. Visit www.fdic.gov for coverage details.*

*** The Bancorp Bank does not charge an application, set up or annual fee. State, local, and/or third-party fees may apply in some states.*

Cash Access Account and SBLOC services are subject to Broker / Dealer approval.

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