



ADVISORY CAPITAL BROKER TRAINING



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MEET A FEW OF THE TEAM MEMBERS WHO WILL HELP YOU AS YOU ENTER OUR PROGRAM



Kassey
Broker
*Support &
Onboarding*



Karen
Sales
Engagement



Marianne
Broker
*Support &
Onboarding*



Alex
*Training and
Course
Support*



MEET A FEW OF THE TEAM MEMBERS WHO WILL HELP YOU AS YOU ENTER OUR PROGRAM



Rickey
*Technical
Architect*



Otto
*Graphic
Design &
Branding*



Sarah
*AP & AR
Controller*



Becky
*General
Counsel*



WHY US?



WE ARE NOT JUST A TRAINING PROGRAM

Our motivation to see you succeed is one of the many reasons you will be successful.



WE LEVERAGE TECHNOLOGY

We are the only program who provides a back office specifically built for commercial capital brokers



WE ARE HERE TO HELP

Our Instructor is here to help guide and coach you along the way.

WHAT IS THE ADVISORY CAPITAL BROKER TRAINING PROGRAM?

ADVISORY CAPITAL BROKER TRAINING | 2023



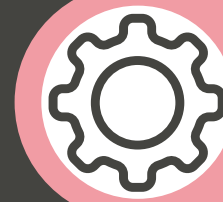
An opportunity to start your own business

Unlimited Income potential



An industry and a career path; not a gimmick or a model

Professional staff and a reputation



Tools and partnerships

Intangibles and emotional intelligence



Help people find capital!

Become a Commercial Loan Broker and a Finance Company Owner.



WHAT IS THE ADVISORY CAPITAL BROKER TRAINING PROGRAM?

- Finance Basics
- Commercial Capital Basics
- Financial Facilities
- Funding Scenarios
- Your Platform
 - Your CRM
 - Calculators
 - Software
- Business Development
 - Ethics and Etiquette
 - Marketing
 - Growth
- Lender introductions and interactions

- Deal structures
- Commission and Admin Setup
- Identifying business and qualifying leads
- Lead Tracking and Organization
- Networks
- Our Instructor and Support Staff Interactions
- Ancillary Products and Upsells
- Contractors and Staffing

Self-paced Course Structure

- Stage 1: Foundations
- Stage 2: Products & Software
- Stage 3: Managing Your Business
- Stage 4: Final Exam
- Each section of each stage has a small checkpoint assessment
- Each stage has a small knowledge check assessment.
- Unlimited attempts
- You will have an instructor available to answer questions at all times throughout the course.

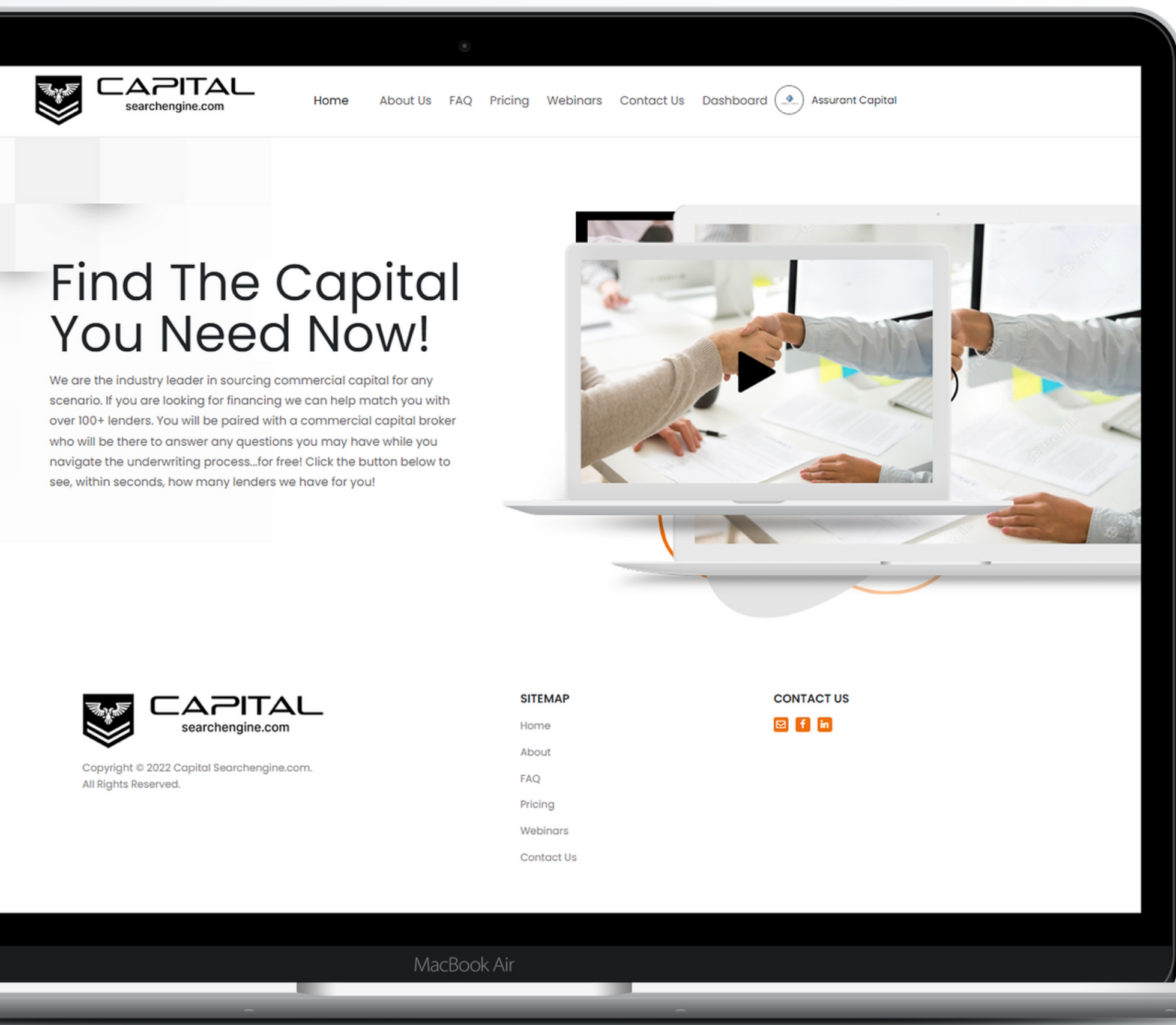


WHAT'S NEW?

- Online on-demand asynchronous course
- Partnership with CapitalSearchEngine.com
- À la carte services opportunity
- Lead generation opportunities
- New product offerings
- Also, introducing Sonia!



PROPRIETARY COMMERCIAL BROKER CRM



Our previous homegrown software that we built and used since conception has been acquired and made available at an enterprise level. Our brokers still get to use this platform for no additional cost!

CapitalSearchEngine.com



DRIVEN TO SUCCEED

This is a true business opportunity. This is not a franchise model. You control your success.



ENJOYS WORKING WITH PEOPLE

The learning curve for commercial capital is very small. The ideal candidate wants to help businesses, wants to network, and wants to be an advocate to their community.



DILIGENT

The deals WILL come. A sense of urgency and willingness to keep things moving is invaluable



ENTREPRENEURIAL

Do you dream of owning a business, making decisions, setting your own hours, deciding your own approach... the fun stuff? This is part of the deal too!

WHAT DOES IT TAKE TO BE SUCCESSFUL?

YOU DO NOT NEED

- Financial experience or aptitude
- Tech savvy or learn technical things
- Existing relationships or network

WHAT'S INCLUDED

\$9,995

- ✓ Self-paced on-demand course to complete at your leisure or Live 2-Day online course.
 - The on-demand course is built on an enterprise course authoring platform used by the largest organizations in the country. No recorded webinars and no poor-quality images or sound.
 - For the live course, we leverage world-class technology, professional broadcasting software, and proprietary solutions to deliver our training to you anywhere in the world. We want you to feel comfortable while learning without barriers and eliminate unnecessary expenses during the start of your business.
- ✓ Direct instructor contact within the course of immersive interactions and clarifications to ensure an environment conducive to becoming a quality broker.
- ✓ Course training manual, all slides, and assessments for your personal use.
- ✓ Continued access to our learning platform for the lifecycle of your business including your new staff members as you grow.
- ✓ Access and relationships with over 100+ lenders.
- ✓ Capability to offer 100+ financial products, with over 10,000+ funding scenarios (not an exaggerated number) from your lenders and funding partners.



WHAT'S INCLUDED

\$9,995

- ✓ Ability to have your challenging deals submitted through a private deal marketplace for investors and other funding partners to make offers to you and your client via your software platform.
- ✓ Access to a proprietary CRM built specifically for commercial capital brokers. Use this software to access the funding scenario tool, deal management, direct lender chat, custom calculators, information repositories, and continued educational opportunities alongside your lenders. No, there is not any other extra monthly charge for this.
- ✓ Access to a broker liaison team through the software platform for guidance and coaching. Each can chat directly with our broker liaison team within the platform.
- ✓ Invite your clients to a professional enterprise CRM to work directly with you and the lender. Clients will be able to utilize the CRM to monitor their deals with a platform expected of any high-caliber lending process in the technology era. Clients can submit documents and chat directly with you as well as the lender.
- ✓ Certificate of Completion as a Commercial Capital Broker.



WHAT'S INCLUDED

- ✓ A Free 1-year subscription to CapitalSearchEngine.com's Broker Digital Brand plan
 - 50% off each additional year; i.e. \$100/month starting in year two

What is Included In This Free Subscription:

- ✓ Custom logo design with unlimited revisions
 - Full commercial rights, PNG files, resizable vector files, a full social media kit for 7 platforms, and three different zoom backgrounds
- ✓ 250 business cards (replenishment each year if subscribed)
- ✓ White-labeled custom domain with your desired web address
- ✓ 2 e-mail account mailboxes with your custom domain name
- ✓ Custom-built website with hosting, maintenance, and full administration
 - Fully optimized SEO (search engine optimization) rollout plan and maintenance to be found on search engine websites
- ✓ Full social media creation, administration, and management with fresh content for blog and e-mail marketing by a dedicated staff member
 - All content is curated and scheduled for you without your involvement
 - Includes LinkedIn and Facebook accounts

\$9,995



WHAT YOU CAN OFFER

Help your clients find capital from as little as \$1,000 to over \$600,000,000+



HOW IT WORKS

1

Generate Leads

2

Qualify Your Lead Through Our Funding Scenario Tool™

3

Submit Required Criteria Through Your Private Portal

4

Generate A Deal Package

5

Submit The Package To The Lender

6

The Loan is Funded

7

Receive 100% Of Your Commission!



LET'S KEEP
IN TOUCH
AND
WORK
TOGETHER



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