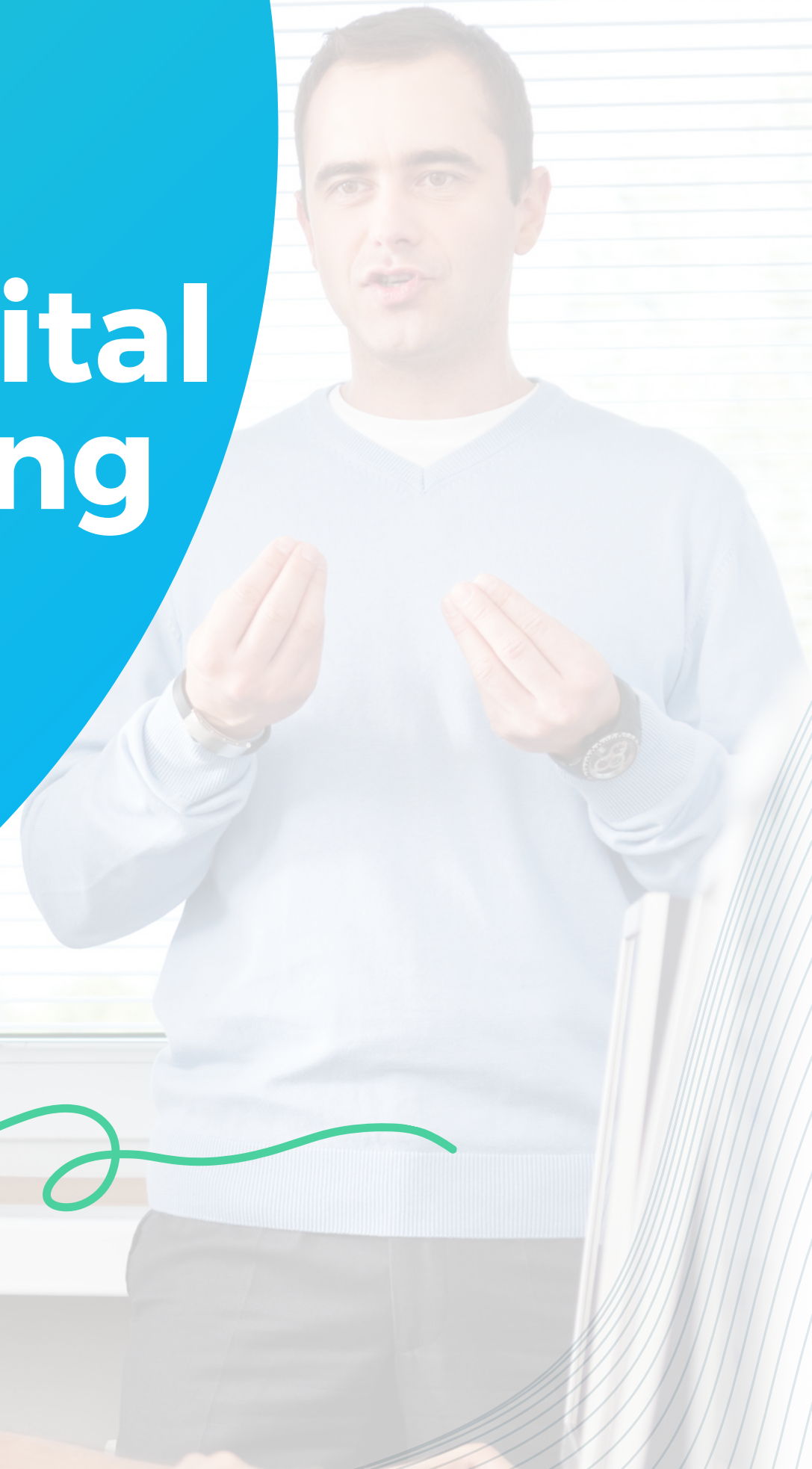




Advisory Capital Broker Training Brochure



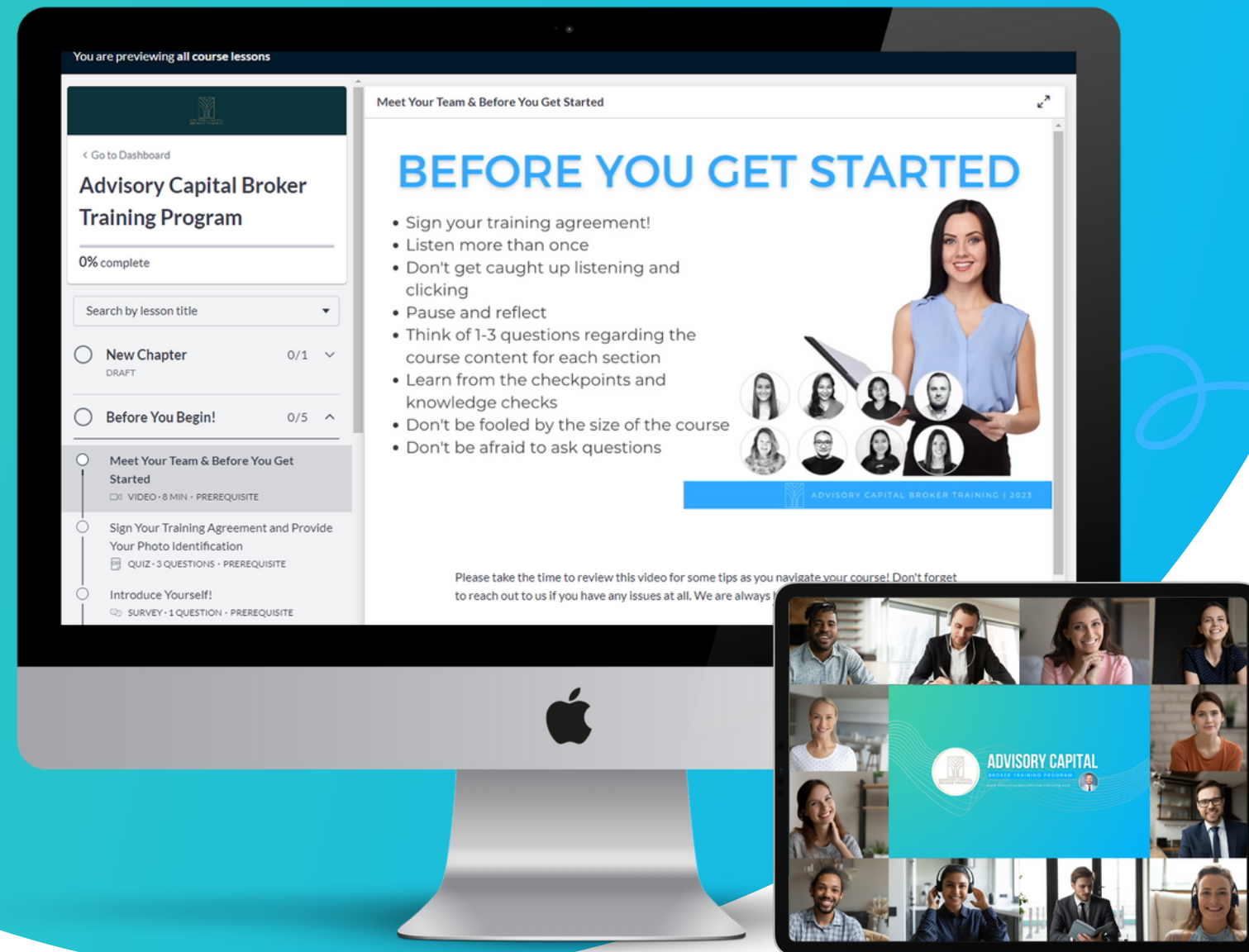
COURSES

SELF-PACED ON-DEMAND

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.

LIVE 2-DAY COURSE VIRTUAL OR IN-PERSON

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 during the start of your business.



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**

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 YOU CAN OFFER

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



EQUIPMENT FINANCING & LEASING



FACTORING



REVOLVING LINES OF CREDIT



SBA LOANS



WORKING CAPITAL LOANS



COMMERCIAL REAL ESTATE LOANS



MERCHANT CASH ADVANCES

...and more!

HOW IT WORKS

1

Generate Leads

2

Qualify Your Lead Through Our Funding Scenario Tool™

3

Submit Required Documents Through Via Your Platform

4

Generate Your Automated Deal Package

5

Submit The Package To The Lender

6

The Loan Is Funded

7

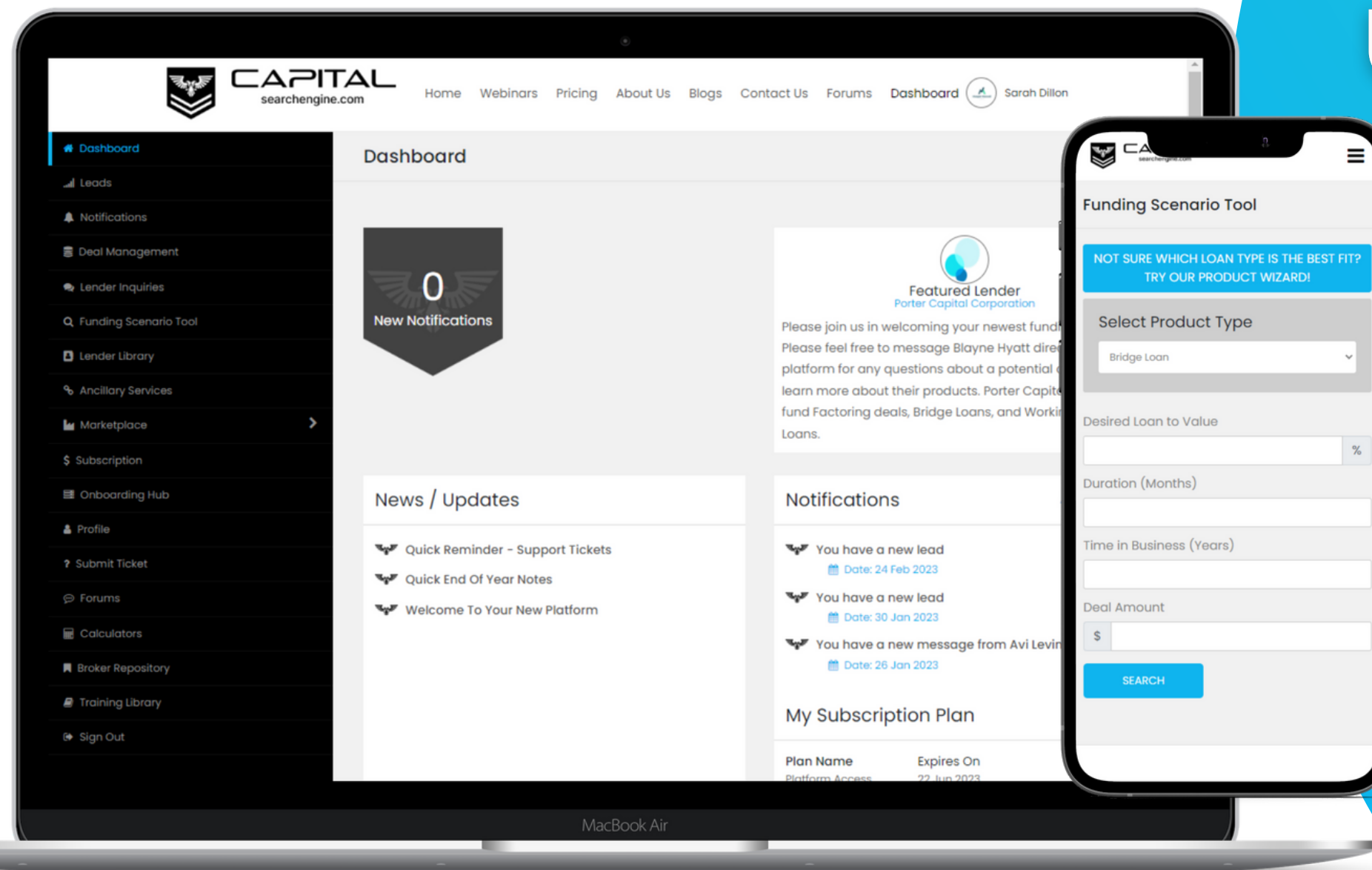
Receive 100% Of Your Commission!

YOUR OWN CRM!

Utilize Your Free CRM!

With our program, brokers gain access to a vast database of vetted lenders and investors, ensuring credible and trustworthy connections.

Our advanced search capabilities allow brokers to quickly query a matching lender based on specific criteria, such as loan size, industry focus, and funding types, streamlining the search for the ideal capital match. Save precious time and effort as our intuitive interface delivers relevant results, putting brokers one step closer to securing the perfect funding opportunities for their clients.





Package Pricing

Unlock Your Commercial Capital Potential
Get Started with Our Comprehensive
Packages!

\$9,995

Entrepreneur

\$14,995

Premium

\$24,995

Professional

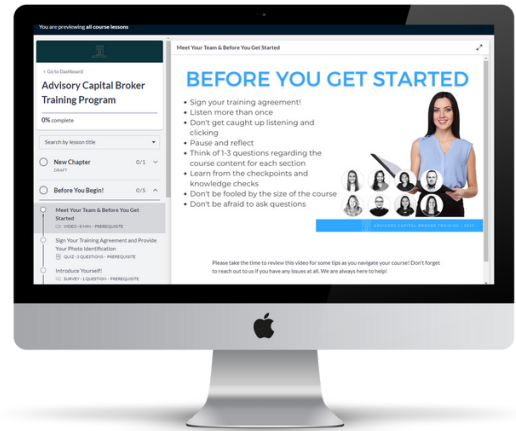
\$34,995

Enterprise

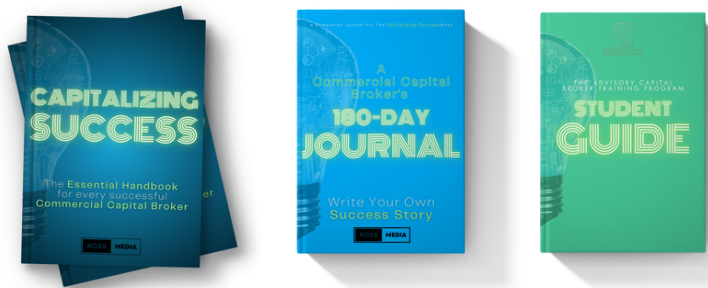
\$9,995 Entrepreneur



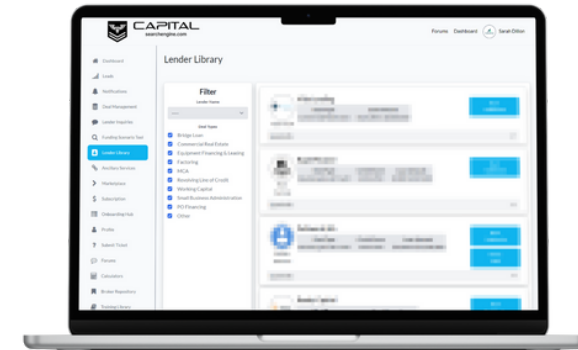
Self-Paced On-Demand Or Live 2-Day Course



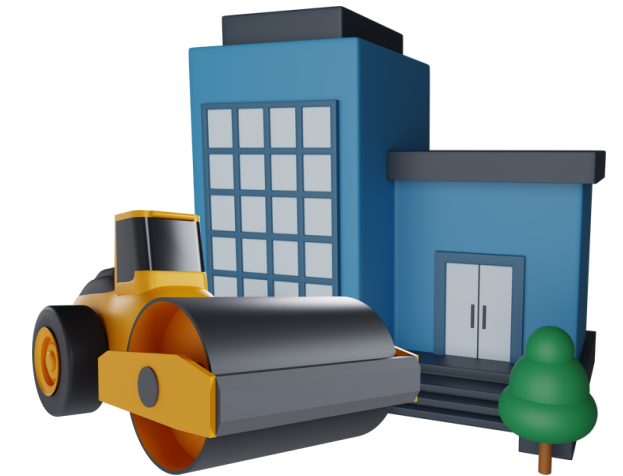
Continued Access To Our Learning Platform For The Lifecycle Of Your Business



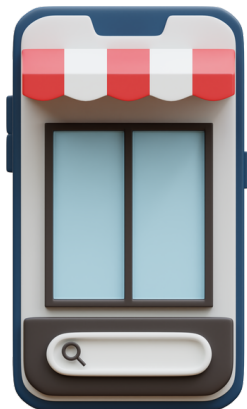
A Copy Of Our Book "Capitalizing Success" With Companion Journal And Student Guide



Access And Relationships With Over 100+ Lenders



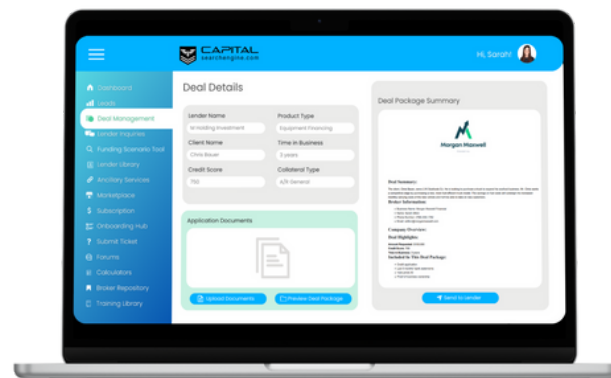
Capability To Offer 100+ Financial Products To Your Clients



Ability To Submit Challenging Deals Through Our "Last Chance" Marketplace



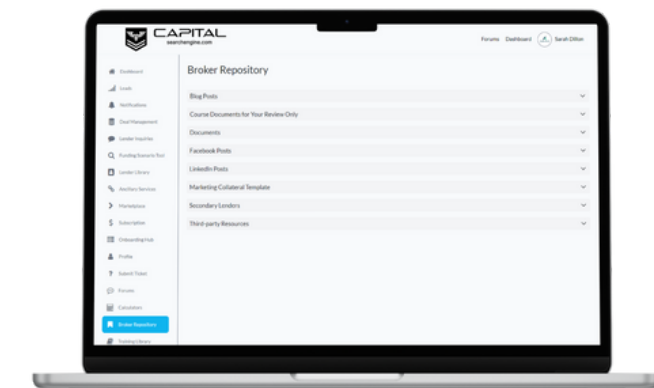
Access To Support Staff For Guidance And Coaching



Custom Built CRM With Funding Scenario Tool And Automated Deal Packager



Individual Client Portals With Live Chat And Document Automation



Access To Master Content Library For Marketing Collateral, Social Media, And Blog Content

and a **Certificate Of Completion As A Commercial Capital Broker!**

\$9,995

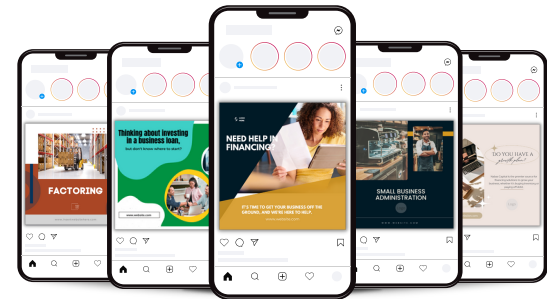
Entrepreneur

What's included in this package?

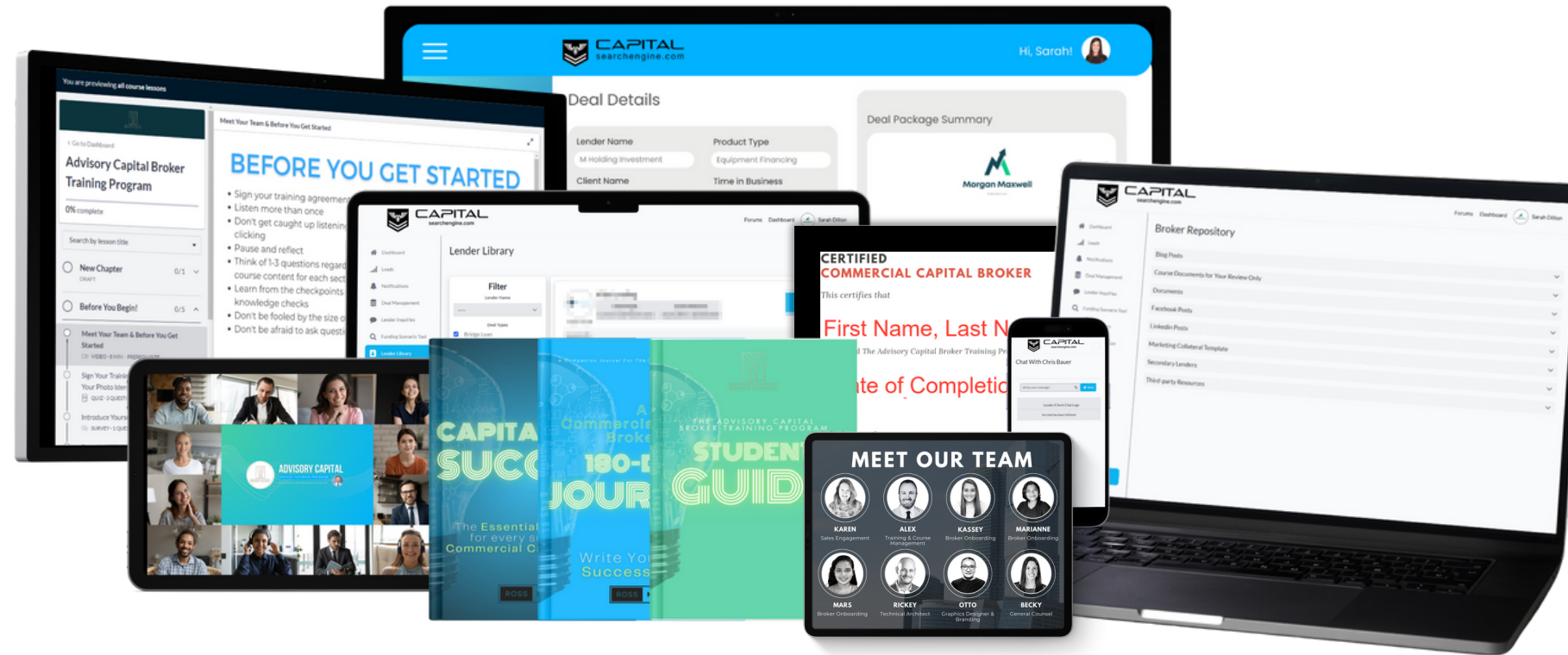
- ✓ Self-Paced On-Demand Or Live 2-Day Course
- ✓ Continued Access To Our Learning Platform For The Lifecycle Of Your Business
- ✓ A Copy Of Our Book "Capitalizing Success" With Companion Journal And Student Guide
- ✓ Access And Relationships With Over 100+ Lenders
- ✓ Capability To Offer 100+ Financial Products To Your Clients
- ✓ Ability To Submit Challenging Deals Through Our "Last Chance" Marketplace
- ✓ Access To Support Staff For Guidance And Coaching
- ✓ Custom Built CRM With Funding Scenario Tool And Automated Deal Packager
- ✓ Individual Client Portals With Live Chat And Document Automation
- ✓ Access To Master Content Library For Marketing Collateral, Social Media, And Blog Content
- ✓ Certificate Of Completion As A Commercial Capital Broker!

\$14,995 Premium

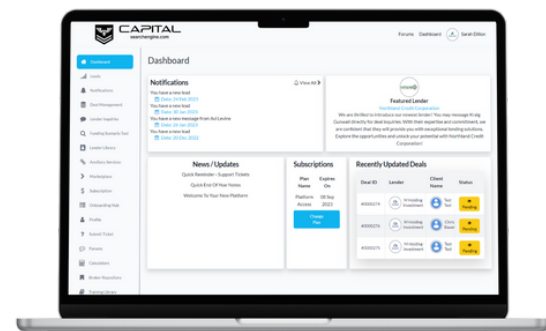
All features listed in the Entrepreneur Package



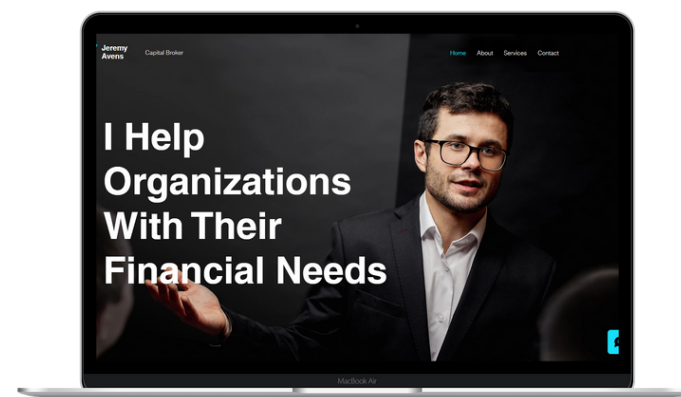
Full social media creation, administration, and management with fresh content for blog and e-mail marketing for five years by a dedicated staff member.



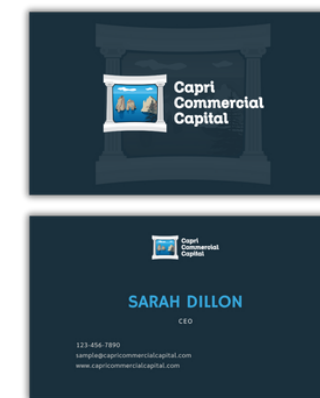
Custom logo design with unlimited revisions with full commercial rights, PNG files, resizable vector files, a full social media kit for 7 platforms, and three different zoom backgrounds.



White-labeled custom domain with your desired web address plus 2 e-mail account mailboxes with your custom domain name with **three years** of support and maintenance.



Custom-built website with hosting, maintenance, and full administration for three years and fully optimized SEO (search engine optimization) rollout plan and maintenance to be found on search engine websites.



250 Business cards.



250 Customized referral partner leads list



One year of monthly customized warm targeted leads (**500** total)

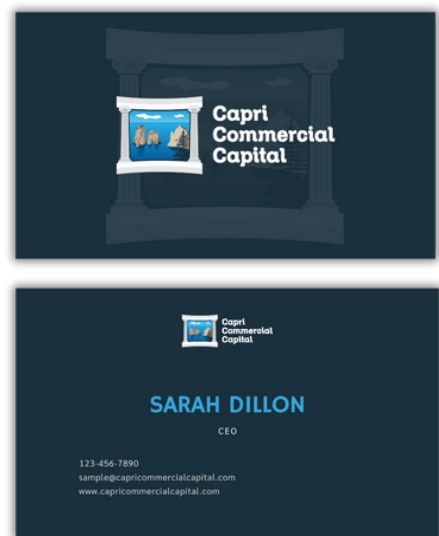
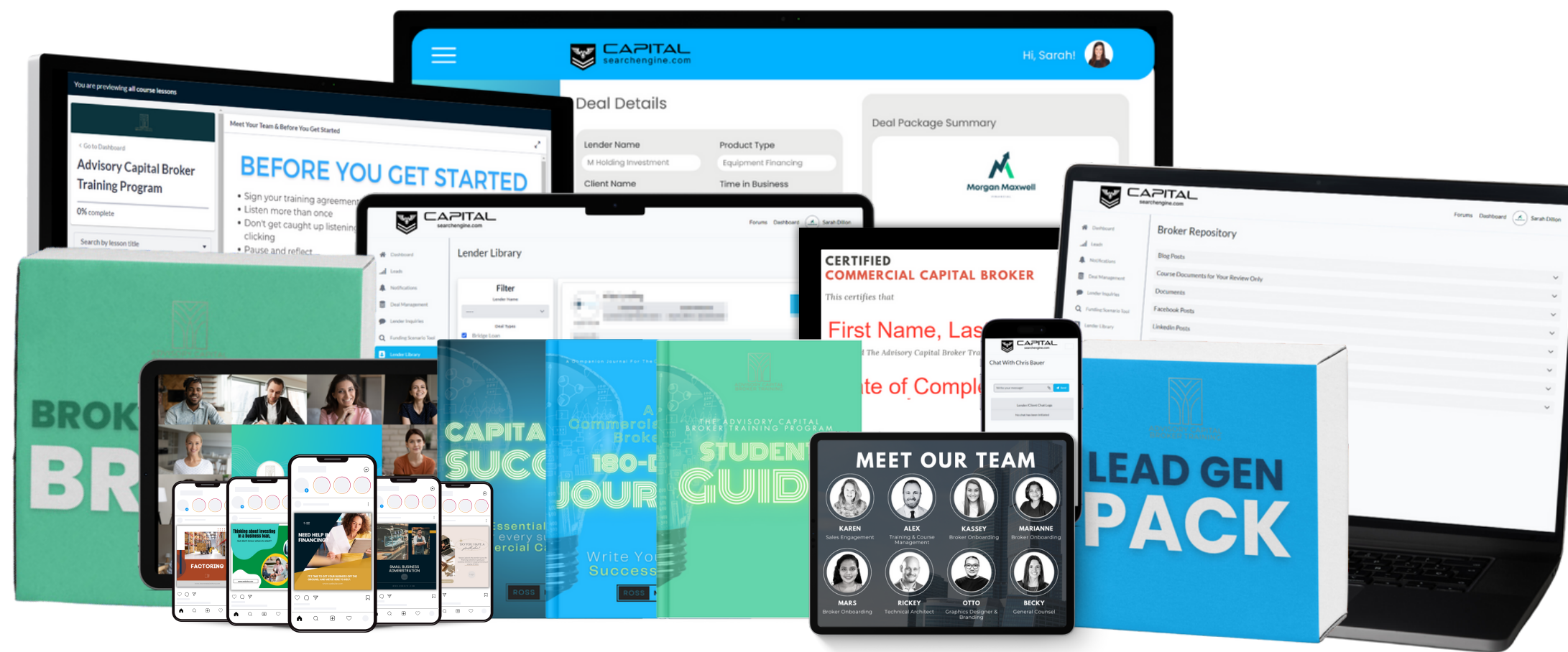
\$14,995 Premium

What's included in this package?

- ✓ All features listed in the Entrepreneur Package
- ✓ Full social media creation, administration, and management with fresh content for blog and e-mail marketing for five years by a dedicated staff member.
- ✓ White-labeled custom domain with your desired web address plus 2 e-mail account mailboxes with your custom domain name with three years of support and maintenance.
- ✓ Custom-built website with hosting, maintenance, and full administration for three years and fully optimized SEO (search engine optimization) rollout plan and maintenance to be found on search engine websites.
- ✓ Custom logo design with unlimited revisions with full commercial rights, PNG files, resizable vector files, a full social media kit for 7 platforms, and three different zoom backgrounds.
- ✓ **250** Business cards.
- ✓ **250** Customized referral partner leads list
- ✓ One year of monthly customized warm targeted leads (**500** total)

\$24,995 Professional

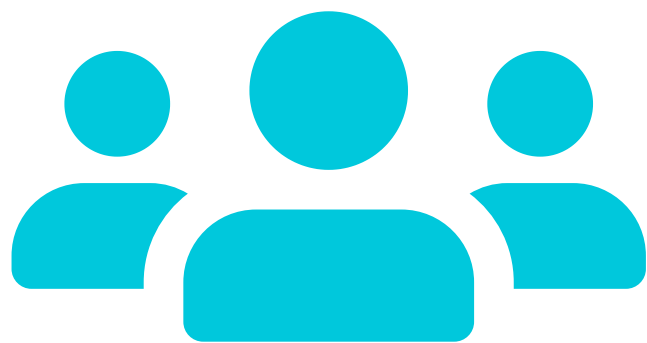
All features listed in the Entrepreneur and Premium Packages



500 Business cards.



One year fully managed marketing and advertising plan. (5-10 leads per month)



250 Customized referral partner leads list



One year of monthly customized warm targeted leads (750 total)

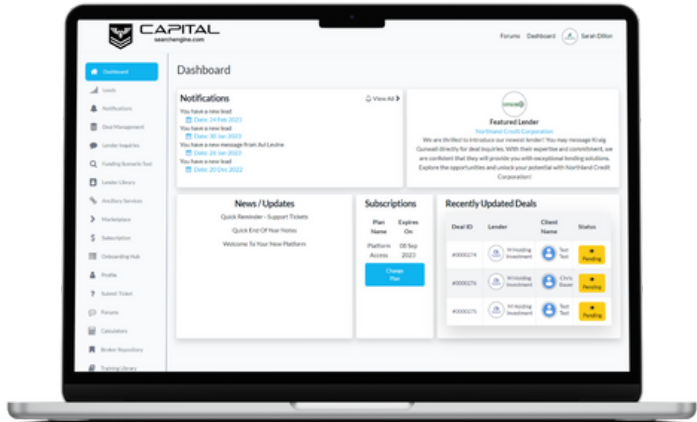
\$24,995 Professional

What's included in this package?

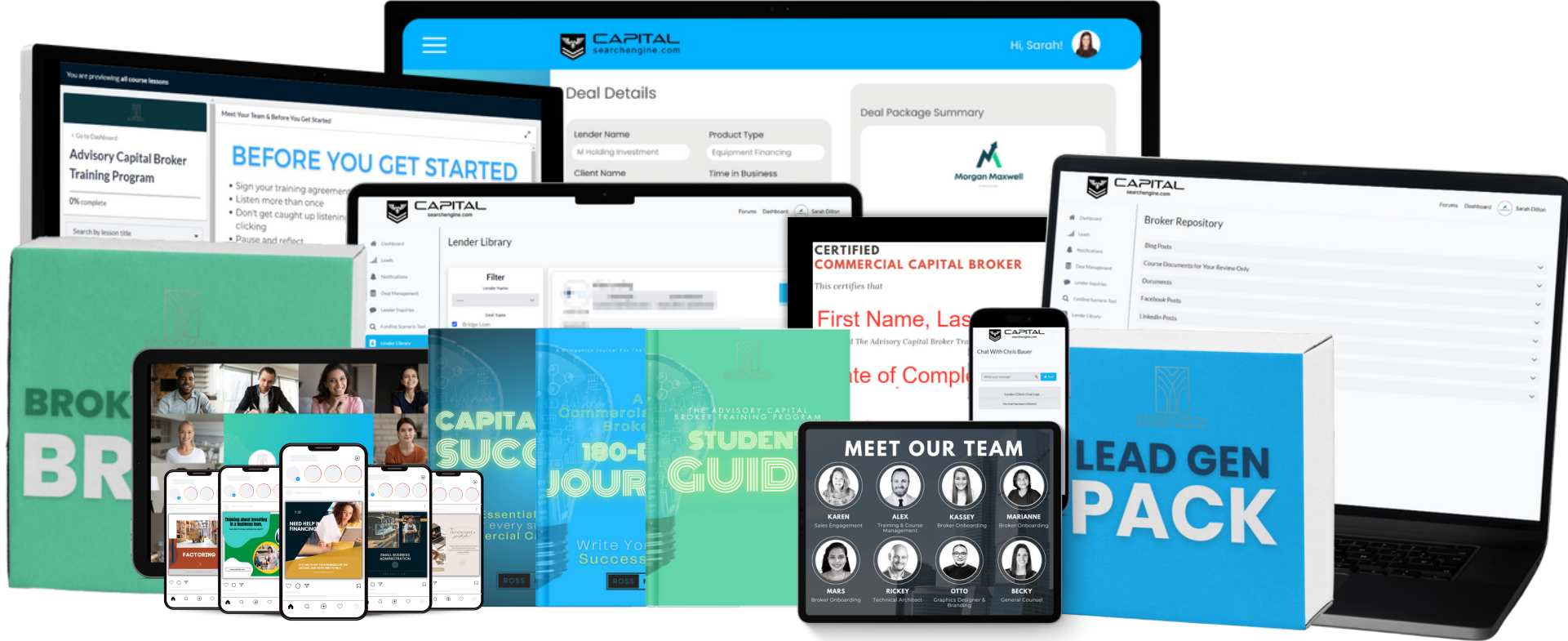
- ✓ All features listed in the Entrepreneur and Premium Packages
- ✓ An increase to **500** business cards.
- ✓ **250** Customized referral partner leads list
- ✓ One year of monthly customized warm targeted leads (Increased to **750** total)
- ✓ One year fully managed marketing and advertising plan (**5-10** leads per month)

\$34,995 Enterprise

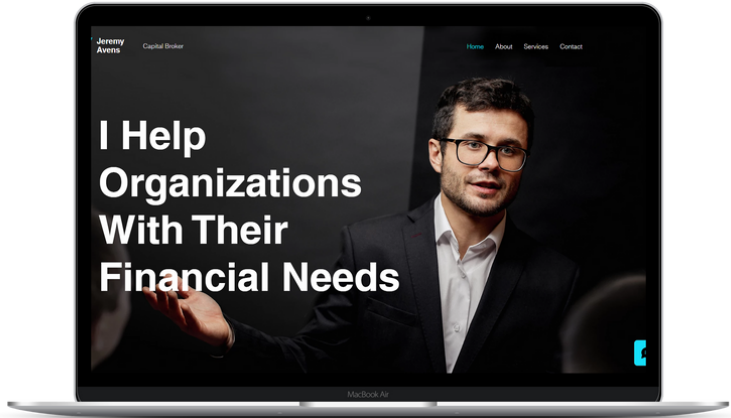
All features listed in the Entrepreneur, Premium, and Professional Packages



2 e-mail account mailboxes with your custom domain name with **five years** of support and maintenance!



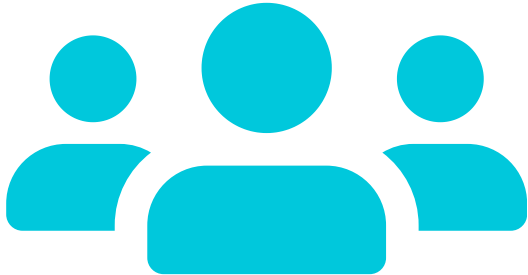
One year fully managed marketing and advertising plan. **(10-20 leads per month)**



Custom-built website with hosting, maintenance, and full administration for **five years!**



1000 Business cards.



500 Customized referral partner leads list



One year of monthly customized warm targeted leads **(1200 total)**

\$34,995 Enterprise

What's included in this package?

- ✓ All features listed in the Entrepreneur and Premium Packages
- ✓ All digital assets supported for 5 years! E-mail account mailboxes, custom domain, SEO, custom website hosting and management, social media management, blog administration and more.
- ✓ An increase to **1000** business cards.
- ✓ An increase to **500** customized referral partner leads list
- ✓ One year of monthly customized warm targeted leads (Increased to **1200** total)
- ✓ One year fully managed marketing and advertising plan (Increased to **10-20** leads per month)

Compare Packages

Entrepreneur

Premium

Professional

Enterprise



SELF-PACED ON-DEMAND OR LIVE
2-DAY COURSE



CONTINUED ACCESS TO OUR LEARNING
PLATFORM FOR THE LIFECYCLE OF YOUR
BUSINESS



A COPY OF OUR BOOK "CAPITALIZING SUCCESS"
WITH COMPANION JOURNAL AND STUDY GUIDE



ACCESS AND RELATIONSHIPS WITH
OVER 100+ LENDERS.



CAPABILITY TO OFFER 100+ FINANCIAL
PRODUCTS TO YOUR CLIENTS



ABILITY TO SUBMIT CHALLENGING DEALS
THROUGH OUR "LAST CHANCE" MARKETPLACE



ACCESS TO A SUPPORT STAFF FOR
GUIDANCE AND COACHING



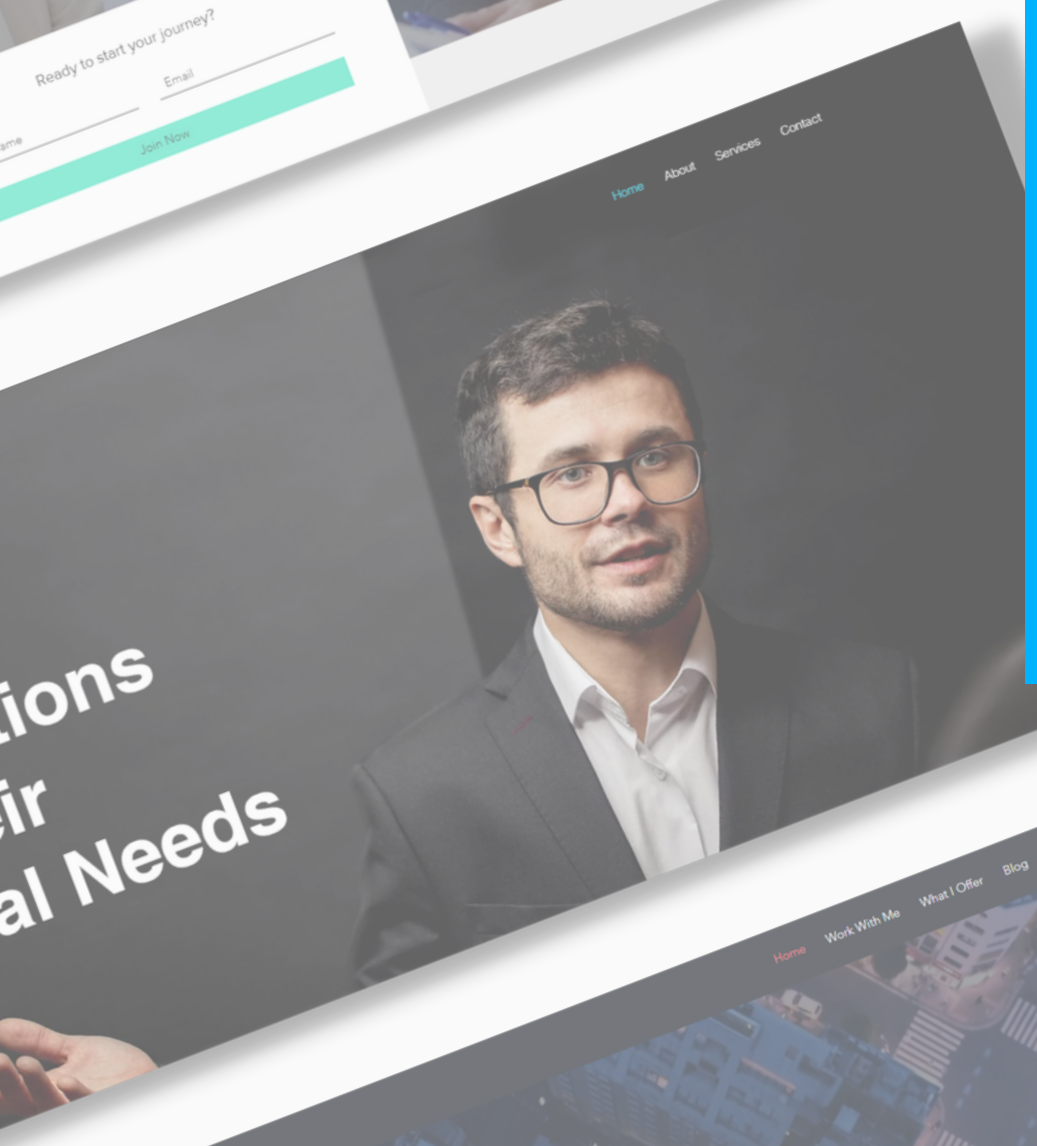
CUSTOM BUILT CRM WITH FUNDING SCENARIO
TOOL AND AUTOMATED DEAL PACKAGER



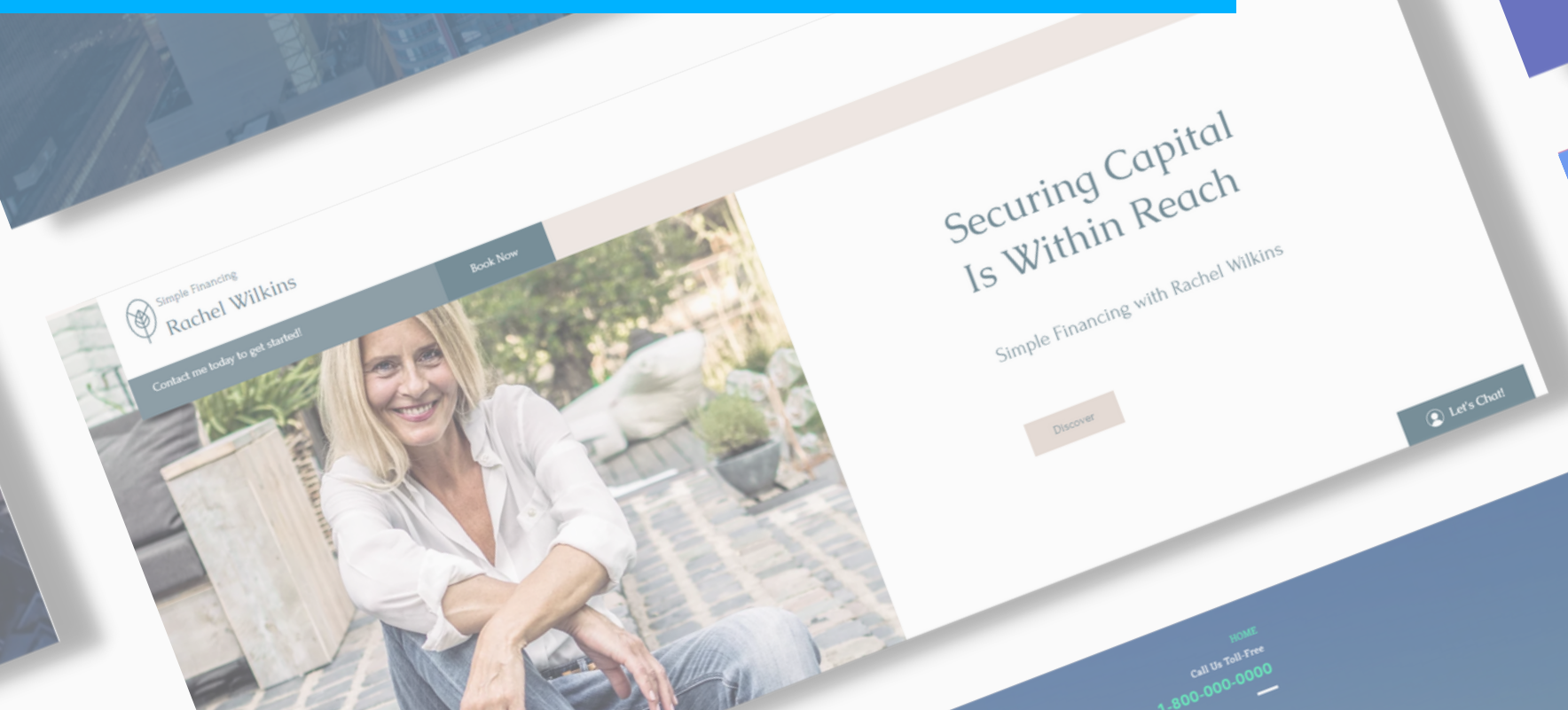
INDIVIDUAL CLIENT PORTALS WITH LIVE CHAT
AND DOCUMENT AUTOMATION



✓	✓	ACCESS TO MASTER CONTENT LIBRARY FOR MARKETING COLLATERAL, SOCIAL MEDIA, AND BLOG CONTENT.	✓	✓
✓	✓	CERTIFICATE OF COMPLETION AS A COMMERCIAL CAPITAL BROKER	✓	✓
Must Subscribe To Broker Digital Plan \$200/Month	✓	CUSTOM LOGO DESIGN WITH UNLIMITED REVISIONS AND A FULL BRANDING KIT	✓	✓
	3 Years	CUSTOM DOMAIN NAME WITH 2 E-MAIL ACCOUNT MAILBOXES	3 Years	5 Years
	3 Years	CUSTOM-BUILT WEBSITE WITH HOSTING, MAINTENANCE, AND SEO OPTIMIZATION	3 Years	5 Years
	3 Years	FULL SOCIAL MEDIA CREATION, ADMINISTRATION, AND MANAGEMENT WITH BLOG AND E-MAIL MARKETING	3 Years	5 Years
	250	CUSTOM DESIGNED BUSINESS CARDS	500	1000
Purchased Ad Hoc Via Your CRM	250	CUSTOMIZED REFERRAL PARTNER LEADS LIST	250	500
	500 Total	ONE YEAR OF MONTHLY CUSTOMIZED WARM TARGETED LEADS	750 Total	1200 Total
		ONE YEAR FULLY MANAGED MARKETING AND ADVERTISING PLAN	5-10 Leads/Month	10-20 Leads/Month



SAMPLE DIGITAL ASSETS



TEMPLATE LINKS

CLICK TO VIEW

- 1 [TEMPLATE 1](#)
- 2 [TEMPLATE 2](#)
- 3 [TEMPLATE 3](#)
- 4 [TEMPLATE 4](#)
- 5 [TEMPLATE 5](#)
- 6 [TEMPLATE 6](#)
- 7 [TEMPLATE 7](#)

- 8 [TEMPLATE 8](#)
- 9 [TEMPLATE 9](#)
- 10 [TEMPLATE 10](#)
- 11 [TEMPLATE 11](#)
- 12 [TEMPLATE 12](#)
- 13 [TEMPLATE 13](#)
- 14 [TEMPLATE 14](#)
- 15 [TEMPLATE 15](#)



AFTER
BROKER SITE



BEFORE
TEMPLATE 11

TEMPLATE 9

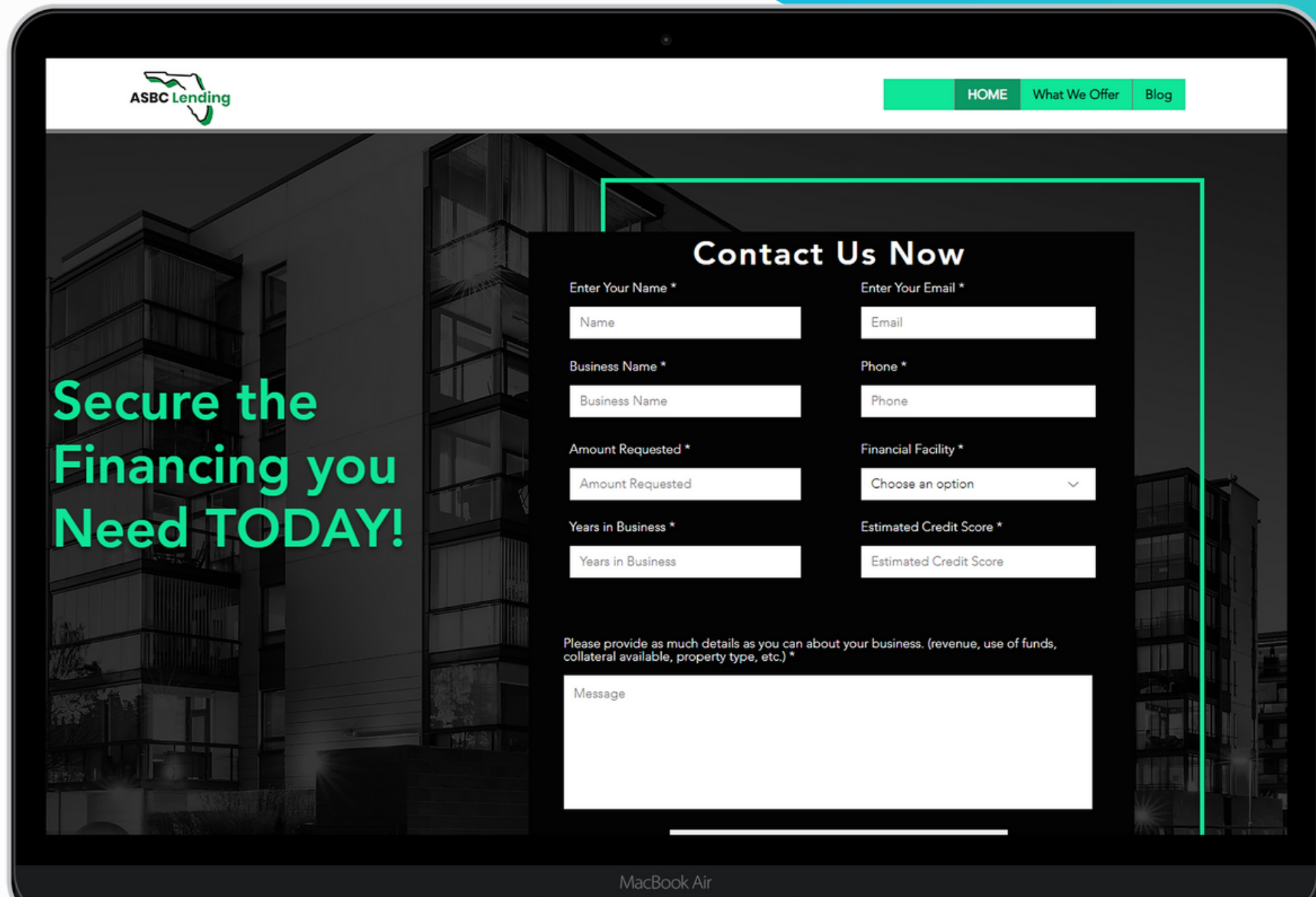


AFTER
BROKER SITE

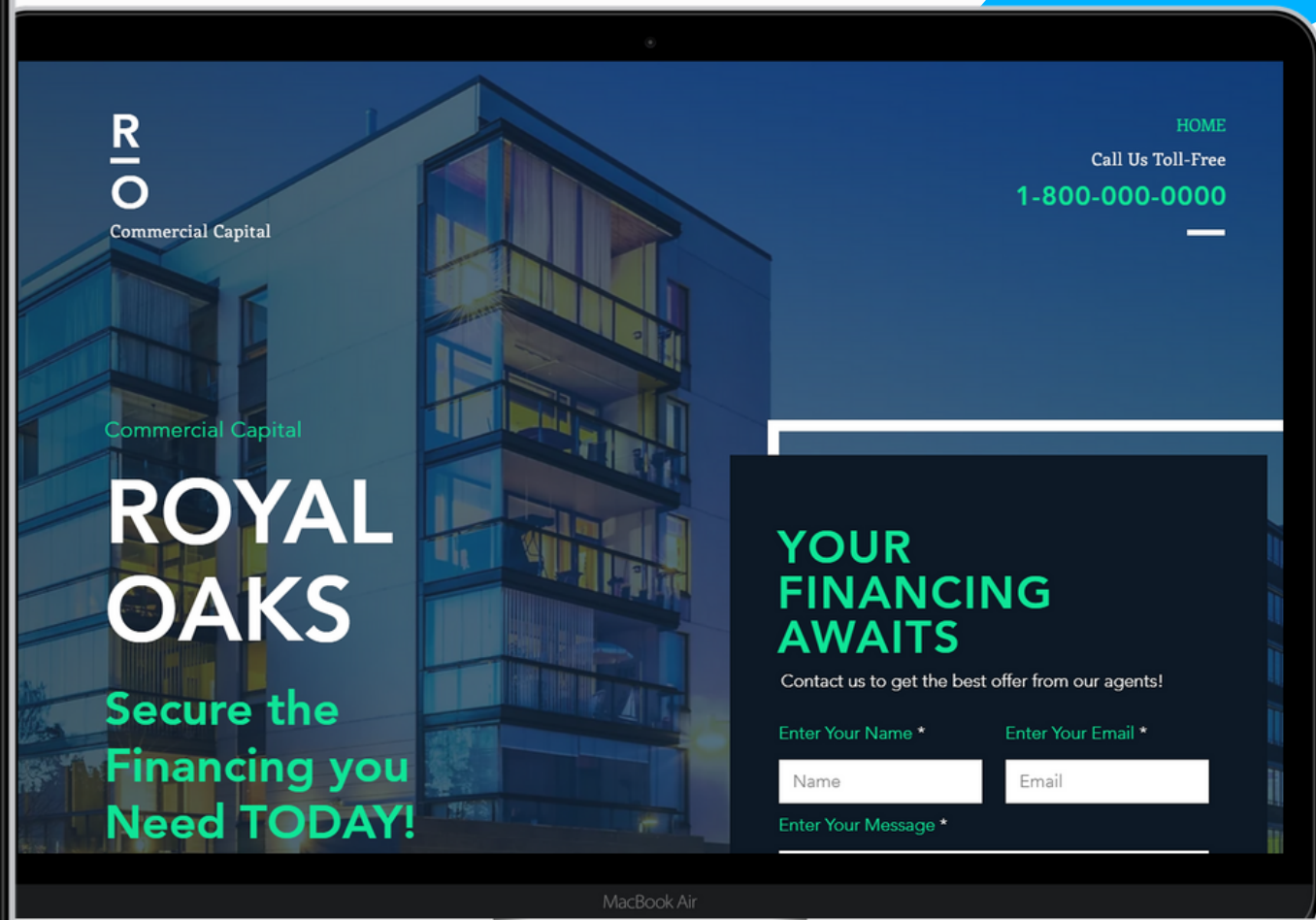


BEFORE
TEMPLATE 9

TEMPLATE 5



AFTER
BROKER SITE



BEFORE
TEMPLATE 5



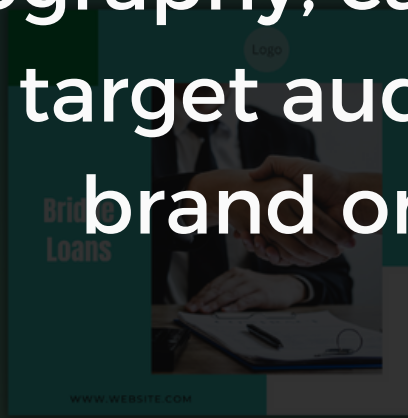
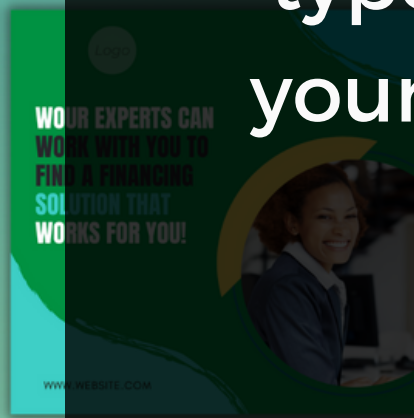


24 Facebook and 12 LinkedIn +Yearly Holidays Posts

24 Facebook and 12 LinkedIn +Yearly Holidays Posts

CLASSIC ESTHETIC

The templates are customizable according to your visual identity. Your color palette, elements, and typography, can greatly affect how your target audience perceives your brand on social media.



24 Facebook and 12 LinkedIn +Yearly Holidays Posts

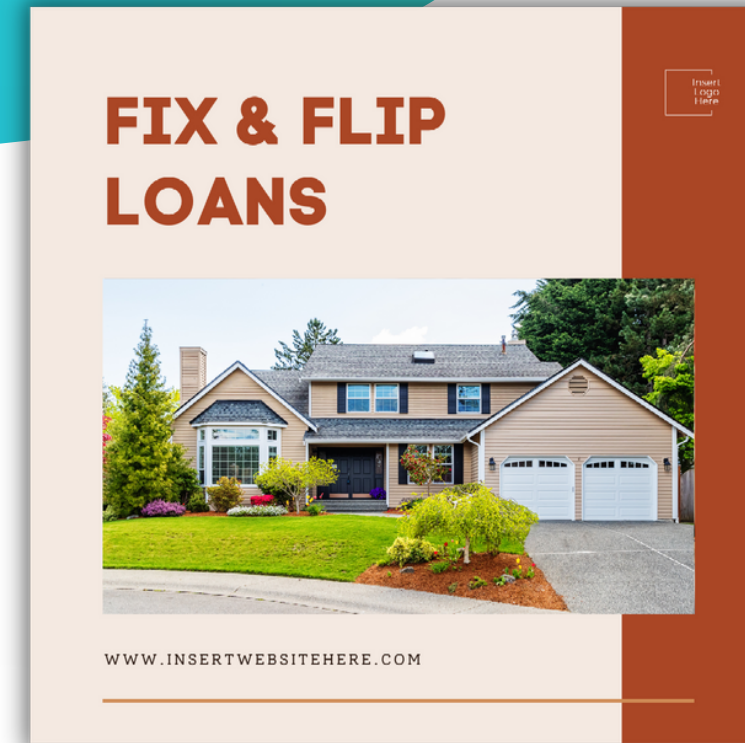
24 Facebook and 12 LinkedIn +Yearly Holidays Posts

COLORFUL MODERN

BRANDING



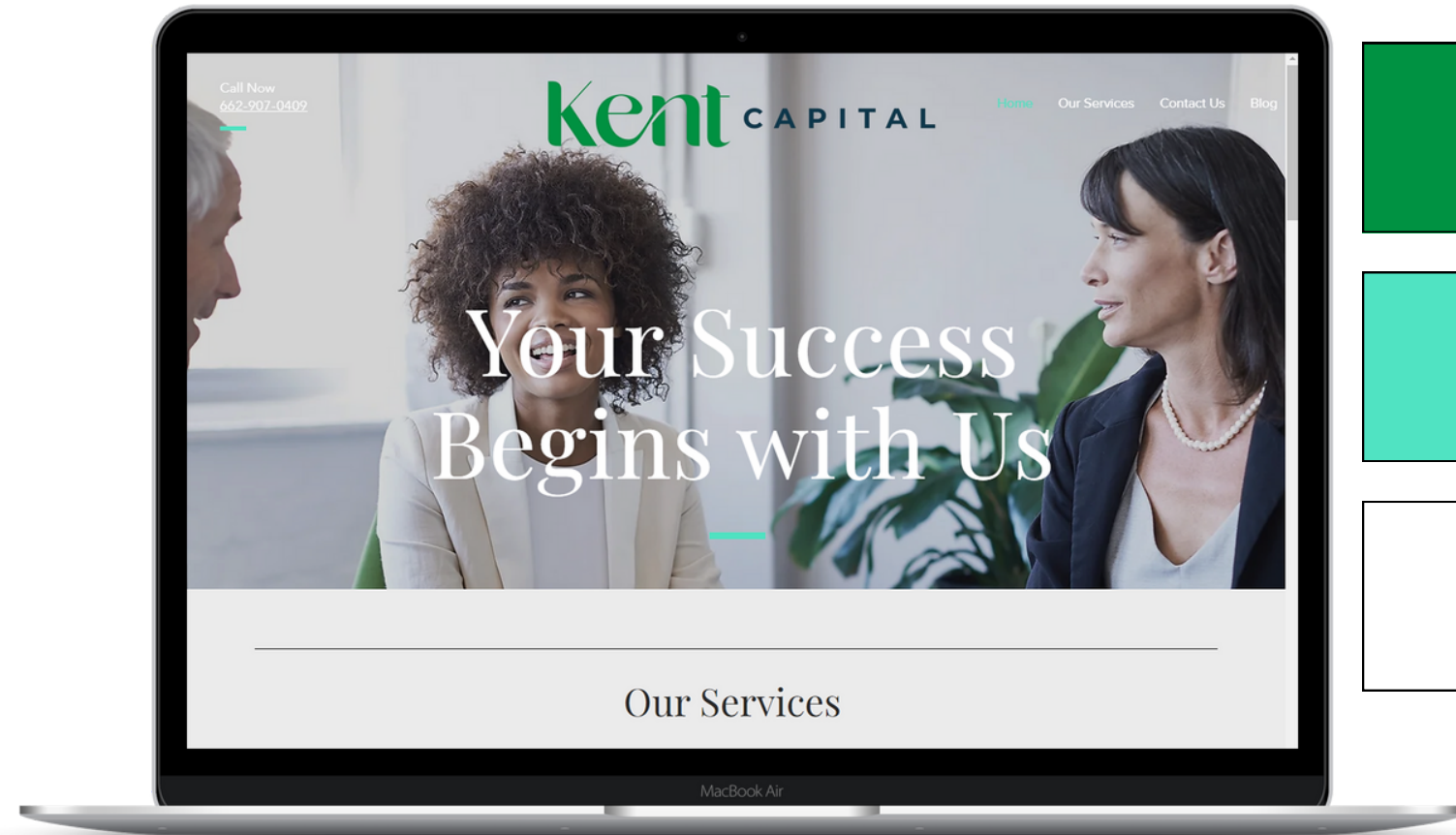
The templates are customizable according to your visual identity. Your color palette, elements, typography, etc., can greatly affect how your target audience perceives your brand on social media.



Theme: Classic Professional



BRANDING



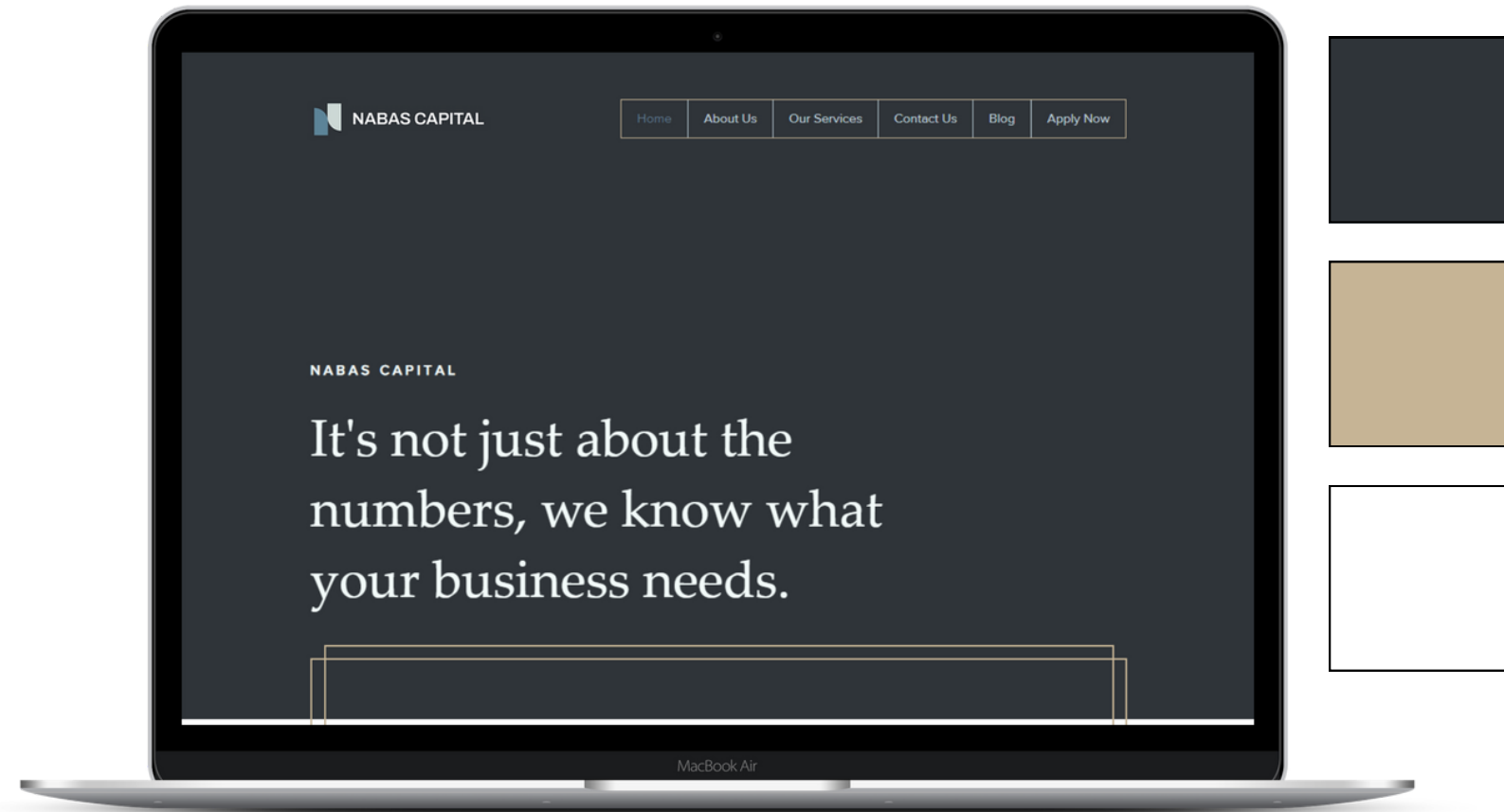
The templates are customizable according to your visual identity. Your color palette, elements, typography, etc., can greatly affect how your target audience perceives your brand on social media.



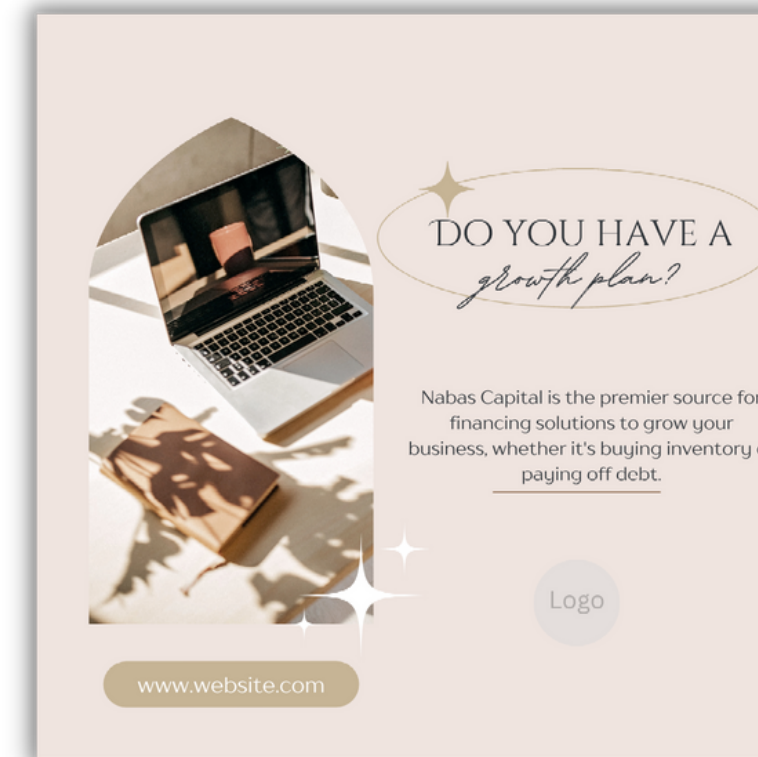
Theme: Colorful



BRANDING



The templates are customizable according to your visual identity. Your color palette, elements, typography, etc., can greatly affect how your target audience perceives your brand on social media.



Theme: Aesthetic



BRANDING

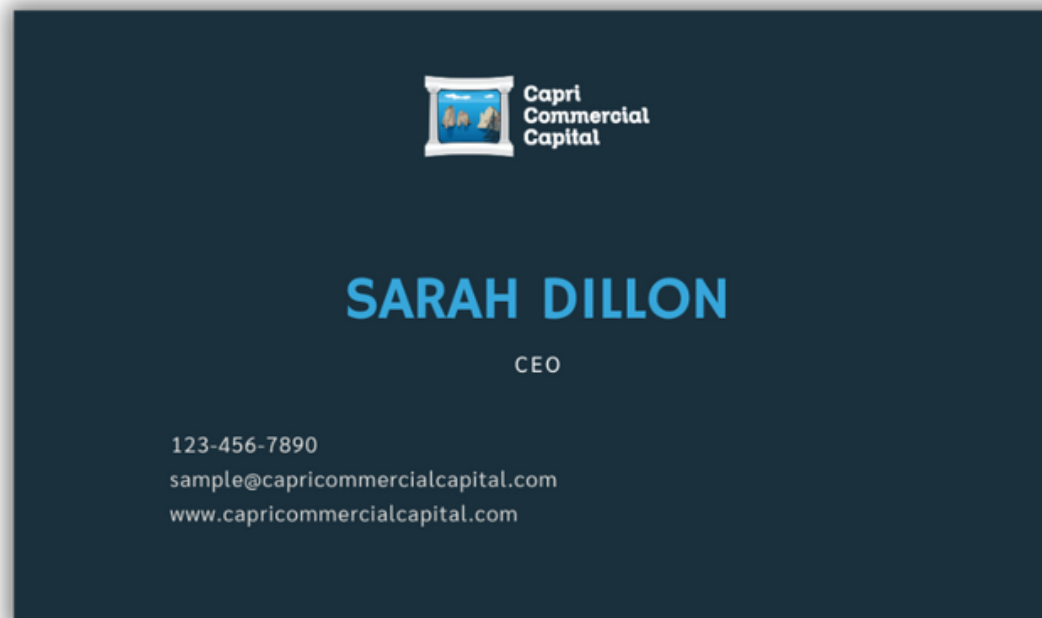


The templates are customizable according to your visual identity. Your color palette, elements, typography, etc., can greatly affect how your target audience perceives your brand on social media.



Theme: Modern





LOGO AND BUSINESS CARDS

- 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)

LEARNING ASSETS

BOOK

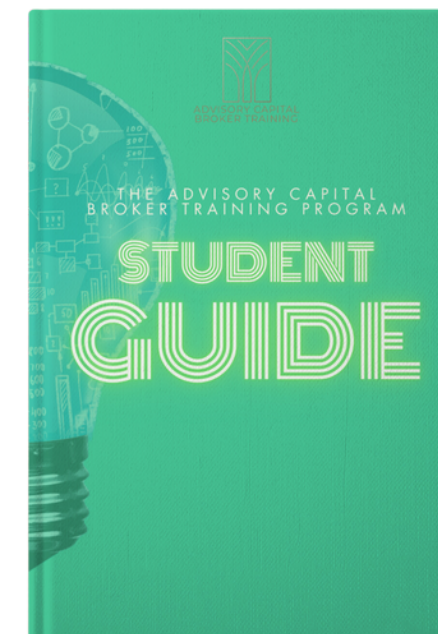
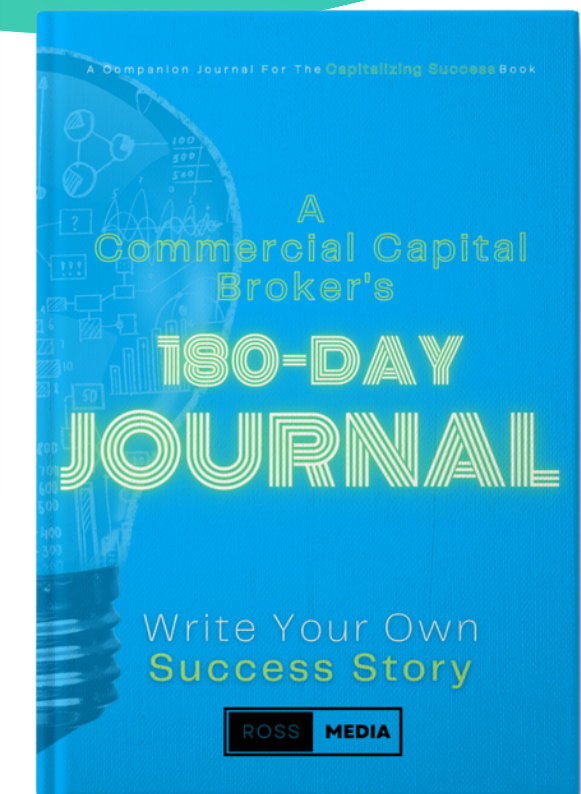
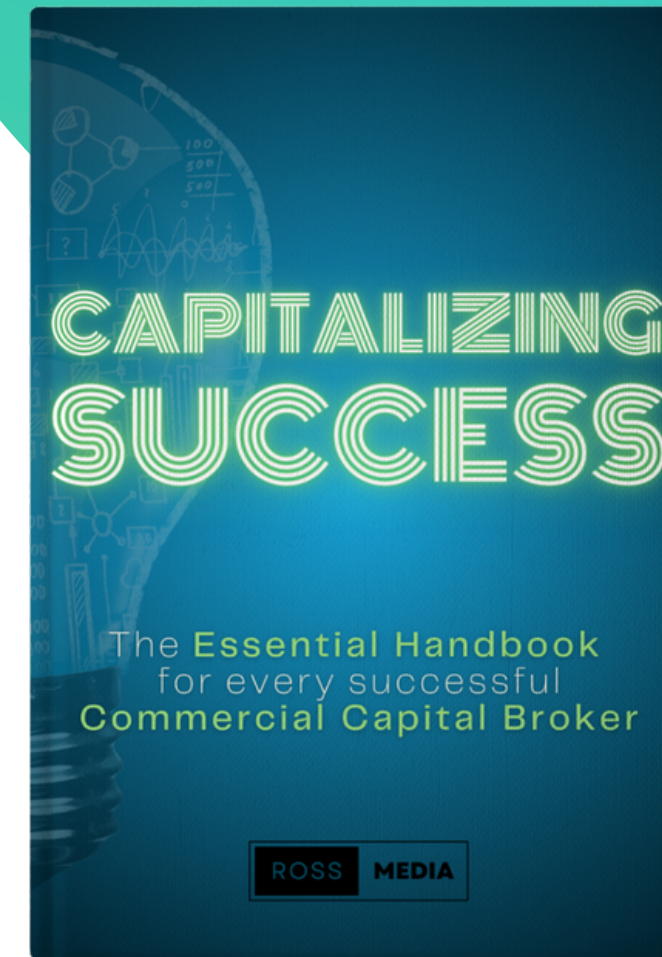
Dive into the fascinating world of commercial capital and unlock its incredible potential for brokers. Discover the secrets and strategies that can propel brokers to unprecedented levels of success and prosperity.

JOURNAL

Discover a wealth of practical strategies, expert advice, and inspiring success stories that will ignite your motivation, equip you with essential tools, and pave the way for reaching new heights of professional fulfillment.

STUDENT GUIDE

Within these pages, you'll find a dedicated space to capture your notes, insights, and reflections. Unleash your full learning potential as you organize your thoughts, track progress, and create a personalized roadmap towards academic excellence.



RECENT DEAL FROM ONE OF OUR **BROKERS**

Multi-family 10 Unit Building:

Hoboken, NJ

Borrower purchased and added a third unit

\$727,300 Fix & Flip ARV

(After Repair Value)

Our Lender Financed:

75% ARV and 100% Rehab Cost

*Additional unit reduced LTV

BROKER'S
COMMISSION

\$9,091



FIX & FLIP

COMMERCIAL REAL ESTATE

RECENT DEAL FROM ONE OF OUR **BROKERS**

Three Additional Truck to Fleet

Grand Rapids, MI

\$426K Equipment Financing

Borrower

600 FICO

11 yrs. in business

3-yr .old bankruptcy discharged

Our Lender

Financed 100%

5 points to the Broker!

BROKER'S
COMMISSION

\$23,100



EQUIPMENT FINANCING

RECENT DEAL FROM ONE OF OUR **BROKERS**

Need:

- \$230K to restructure debt, payoff IRS, and obtain additional working capital
- Has current MCA for \$16K/mo at \$800/day

Our Lender Financed:

- Refinanced \$125K off MCA debt
- Paid off a \$60K tax lien
- Provided \$55K of working capital
- New payment: \$6,300/mo
 - \$10K/mo cashflow

BROKER'S
COMMISSION

\$7,200

DIGITAL MARKETING AGENCY



WORKING CAPITAL LOANS

RECENT DEAL FROM ONE OF OUR **BROKERS**

Multi-family 10 Unit Building:

Cleveland, OH

\$659,950 Fix & Flip ARV

(After Repair Value)

Our Lender Financed:

75% ARV and 100% Rehab Cost

BROKER'S
COMMISSION

\$9,389



FIX & FLIP

COMMERCIAL REAL ESTATE

RECENT DEAL FROM ONE OF OUR **BROKERS**

Plus

\$750 every month the client's account stayed on their books regardless of draw!

Accounting Staffing Firm

San Diego, CA

\$500K/mo in Accounts Receivables

BROKER'S
COMMISSION
\$7,500

FACTORING



Meet a few of the team members who will help you as you enter our program

Experience unwavering support from our dedicated Broker Onboarding team. We're here to guide you through every step, answer your questions, and provide personalized assistance. Count on us for a seamless and fulfilling journey via the [CapitalSearchEngine.com](https://www.CapitalSearchEngine.com) platform.



KAREN
Sales Engagement



KASSEY
Broker Onboarding



MARIANNE
Broker Onboarding



MARA
Broker Onboarding



RICKEY
Technical Architect



OTTO
Graphic Design & Branding



BECKY
General Counsel



ALEX
Training and Course Management




LET'S KEEP
IN TOUCH
AND
WORK
TOGETHER



 Info@AdvisoryCapitalBrokerTraining.com

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Suite 110-4306
Tampa, FL 33602

www.advisorycapitalbrokertraining.com