

# FILLING THE FUNDING GAPS

## HELPING YOU CLOSE MORE LOANS

We haven't met a bank development officer yet who wouldn't like a higher loan close rate. You know the equation that adds up in today's lending environment: increased liquidity creates better borrowing strength, which leads to a higher loan acceptance and close rates. It's a win-win: You achieve your business goals when you help your clients do the same.



## ACCESS TO RETIREMENT FUNDS WITH NO PENALTIES, NO TAX AND NO LOOPHOLES

YOUR BORROWER CAN INCREASE LIQUIDITY  
to better qualify for loan to:



START A BUSINESS



BUY A BUSINESS



EXPAND A BUSINESS

As specialists in governmentally approved self-directed 401(k) financing, we work with individuals every day who have retirement funds that they're ready to invest in a new business opportunity, but they just don't know how to get started. Directed Equity uses the proprietary directINVEST model to transform that fear into financial freedom, customizing each entrepreneur's financing plan. Our attorneys, CPAs and financing experts guide franchisee candidates through the intricacies of establishing a plan, unlocking funds, tax and retirement considerations, wealth accumulation, and the employee-retention benefits of the directINVEST program.



direct**EDUCATE™**

BECAUSE  
KNOWLEDGE  
IS POWER

Directed Equity provides a personalized, one-on-one webinar to help entrepreneurs choose the best financing option for their next business venture. directEDUCATE is designed to walk entrepreneurs through our self directed 401(k), SBA, conventional and equipment financing to achieve mid and long-term financial goals, along with key tax planning and wealth accumulation strategies.

Let's Talk

303-532-4540

Ready to become  
referral partner and  
launch your sales status  
into the stratosphere?  
Call us today.



## ACCESS TO RETIREMENT FUNDS WITH NO PENALTIES, NO TAX AND NO LOOPHOLES

### INCREASED LIQUIDITY FOR BUYERS—INCREASE YOUR CLOSE RATE

As specialists in self-directed 401(k) financing, we work with individuals every day who have retirement funds that they're ready to invest in a new business opportunity. Directed Equity uses the proprietary directINVEST model to unlock funds and turn them into liquid assets for a new business opportunity without taxes or penalties.

### directINVEST™ 4 STEP PROCESS

1

Establish a new C-Corp Entity



2

Create New 401(k) Plan  
Under New C-CORP



3

Transfer Funds From  
Current Retirement Account  
To New C-CORP Retirement Plan



4

The Stock Transaction

