

Solutions for Accounting and Financial Planning Firms

Macquarie has a proud history of helping our clients unlock their potential.

Our specialist team understands the unique requirements of your accounting and financial planning firm.



Specialist bankers
in financial services



Funding for acquisition/
partner buy-ins



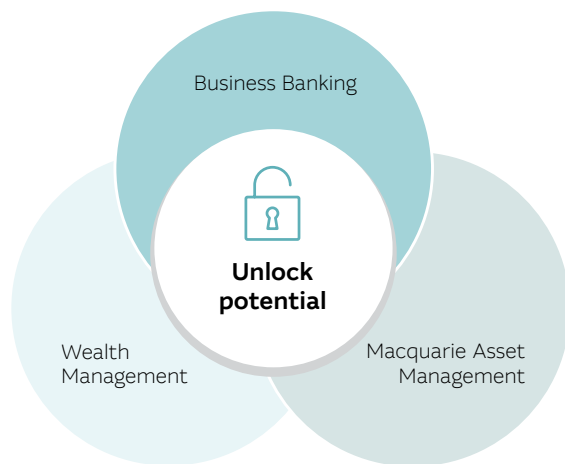
Industry
expertise



Flexible
structuring



Diverse capability across
Macquarie Group



With Macquarie, you have the dedicated support of a bank with a track record of providing tailor-made financial solutions to support your goals.

Business Banking	Wealth Management	Macquarie Asset Management
<ul style="list-style-type: none"> • Succession and acquisition finance • Working capital facilities • Transactional banking and payment solutions • Partners' commercial property mortgages 	<ul style="list-style-type: none"> • Cash management solutions • Term deposits • Platform solutions: Macquarie Wrap, managed accounts, online trading • Virtual Adviser Network 	<ul style="list-style-type: none"> • Global asset manager • Real assets, fixed income and multi-asset management • Energy transition and sustainability • Focus on major structural drivers of long-term growth

Solutions for Accounting and Financial Planning Firms

Accounting and Financial Planning

- Loan sizes are dependent on a number of factors, but our target lending requirements are typically \$1 million and above.
- Minimum of two or more qualified financial advisers/ accountants within the business
- Minimum of \$1.5 million of recurring revenue
- Financial planning firms to be self-licensed or an authorised representative of a Macquarie accredited dealer group
- Funding capacity of 3.75 x normalised EBITDA* (normalised for partner salaries of \$185,000 per partner)
- Interest only ongoing available at 2.5 x normalised EBITDA*

Our difference starts with providing sophisticated, thought-provoking solutions, based on your unique requirements, and is underpinned by our relationship banking model. Macquarie Business Banking clients benefit from our broad industry knowledge base and strong connections across the accounting & financial services industries.

With Macquarie, you have the dedicated support of a bank with a track record of providing tailor-made financial solutions, to support your goals.

If you'd like to speak about your unique banking requirements, you can **request a call** from a member of our specialised banking team.



[Request a call.](#)



[Learn more.](#)

*This is a guide only. EBITDA can be adjusted for items such as principal salaries, exceptional items and other factors based on individual borrower circumstances.

This information is issued by Macquarie Business Banking, a division of Macquarie Bank Limited ABN 46 008 583 542 AFSL and Australian Credit Licence 237502 (MBL). It doesn't take into account your objectives, financial situation or needs, nor is it intended as a substitute for any accounting, tax or other professional advice, consultation or service – please consider whether it's right for you. Information on lending parameters is provided as a guide only. Each loan will be subject to individual assessment in accordance with our credit and other internal policies. Additional parameters may apply.

Macquarie deposit products are issued by MBL. The Virtual Adviser Network is provided by MBL. Macquarie Wrap products are issued by Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281 (MIML).

Except for MBL, any Macquarie entity referred to is not an authorised deposit-taking institution for the purposes of the Banking Act 1959 (Cth). That entity's obligations do not represent deposits or other liabilities of MBL. Any investments are subject to investment risk including possible delays in repayment and loss of income and principal invested. MBL does not guarantee or otherwise provide assurance in respect of the obligations of that entity, unless noted otherwise.

The information in this flyer is current as at 31 January 2025 and is subject to change.