

# Solutions for Accounting and Financial Planning Firms

We bank with Macquarie





macquarie.com.au





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


Our specialist accounting and financial planning team understand your firm's unique requirements.


 Specialist bankers in financial services

 Funding for acquisition /partner buy-ins

 Industry expertise

 Flexible structuring

 Corporate advisory

 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

- Succession and acquisition finance
- Working capital facilities
- Transactional banking and payment solutions

## Wealth Management

- Online trading
- Managed accounts
- Self-managed superannuation funds
- Wrap and cash solutions

## Personal Banking

- Mortgages
- Savings and transaction accounts
- Credit cards

## Leasing and Equipment Finance

- Vehicle leasing
- Car buying service
- Fit-out finance
- Medical equipment finance

## Financial planning

- Minimum of \$1.00m business lending
  - Minimum of 2 x qualified advisors within the business
  - Minimum of \$750,000 of recurring revenue (wealth or risk)
  - Self-licensed or an authorised representative of a Macquarie accredited dealer group
  - Funding capacity of;
    - 50% of business value based on 2.5 x investment recurring income, 2.8 x risk recurring income
- AND/OR**
- 3 x normalised EBITDA (after partner salaries of \$150,000 each)
- Subject to 10 – 15 year repayment horizon (no interest only terms)

## Accounting

- Minimum \$1.00m business lending
- Minimum of 3 x qualified accountants
- Funding up to 3.3 x normalised EBITDA (after partner salaries of \$150,000 each)
- Subject to 10 – 15 year repayment horizon (no interest only terms)
- Subject to borrowing amount being < 60% of 1 x standard accounting income
- Subject to maximum debt per guarantor of \$1.00m

## Multi-discipline Accounting and Financial Planning

- Bespoke combination of the above; please call Macquarie Bank contacts below to discuss.

**Our difference starts with listening and understanding, then providing sophisticated, thought-provoking solutions, underpinned by our relationship banking model, access to industry knowledge base and strong connections across the accounting & financial services segments.**

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Learn more at

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