



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



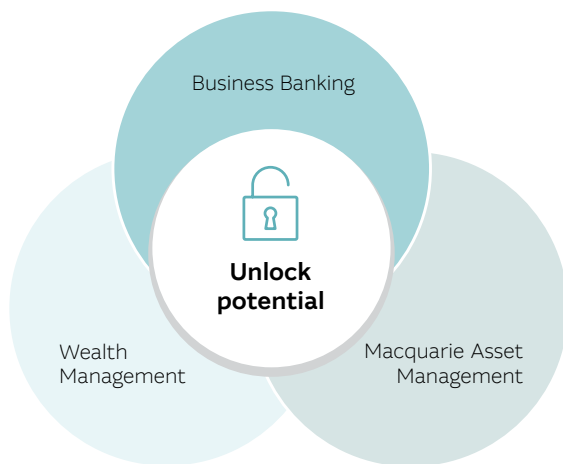
Industry expertise



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' residential and 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

Accounting and Financial Planning

- Minimum of \$1 million business lending
- 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 EBITDAE (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.](#)

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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).

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The information in this flyer is current as at 24 May 2024 and is subject to change.