



We are open for business and here to support you for all your Investment Loans. Our teams are actively working in this rapidly changing environment to continuously provide your operations the service you need.

Great news! You can now send **all documents by Fax 1 (866) 944-7711**. Originals are not required. For loans of \$100,000 and less (including existing loans) Proofs of Assets and Proof of Income are generally not required.

Investment Loans – Mutual Funds

- Collateral / funds must be held in a B2B Investment Account
- Funds are disbursed to the B2B Investment Account
- Transactions are initiated by the dealership / advisor

There are three programs for Mutual Fund Investment Loan (currently, we are offering the same rate for all three):

Distribution Alliance Program (DAP) - Limited to one mutual fund / manufacturer with an executed DAP with B2B

Select - Combination of funds / manufacturers with an executed DAP with B2B

Standard -

- All approved funds / manufacturers on the B2B Intermarry Platform
- Funds / manufacturers without an executed DAP with B2B are only available for this program

Investment Loans – Seg Funds

- Collateral / funds must be held in a B2B Investment Account
- Seg fund Investment Loans can only be done with funds / manufacturers who have executed a DAP with B2B
- Transactions must be initiated by B2B Bank Dealer Services

Dual licensed advisors (Seg funds & mutual funds) must have two different profiles, one for seg funds, and one for mutual funds.

Applications received in good order are processed within 24 to 72 hours. Note, with the COVID-19 environment there may be longer turnaround times.

For Advisors who may have questions on Investment Loan processing or require training, we are available to organize a webinar / conference call or have a Business Development Manager reach out directly to provide support.

The following links regarding RSP, TFSA & Investment Loans for your reference

Approved seg and mutual fund manufacturers for DAPs:

<https://b2bbank.com/loans/distribution-alliance-programs>

Investment Loan Workflow — Online Submissions

<https://b2bbank.com/workflows/investment-loan-online-submissions>

Frequently Asked Questions – Loans

<https://b2bbank.com/en/faq/index?tab=loans>

Michael Adams Cumberbatch
Senior Manager National Distribution
Business Development
B2B Bank (Division of Laurentian Bank)

Office: 416.869.8382

Mobile: 437.236.8781

Email:

michael.cumberbatch@b2bbank.com