

From The Desk Of...

Peeling Back the Onion



From The Desk Of is a series that profiles real advisors solving problems for their clients using GS Select.

Too often borrowing becomes complex, layered with multiple parties, costs and exceptions-to-the-rule. One advisor recently told us about his client's dissatisfaction with a lender that had overstructured a relatively simple borrowing deal, costing him extra money.

The advisor was new to the lending world and didn't know the best course of action to advise his client. Together, he and a lender from the GS Select team combed through the details, identified some concerns, and realized that the existing line of credit was really securities-based. The advisor and his client ultimately switched to GS Select, appreciating the transparency provided by the loan dashboard and a team to walk them through everything. The result: the advisor was able to meet his client's need, gain experience managing liabilities and build a stronger relationship that led to an increase in his AUM.

Have a story to tell about your experience with GS Select? Let us know.

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