CLIENT CASE STUDY

Acquisition Financing for a Family-Owned Car Wash | Arizona

RIA Client Profile | Physicians & Military Veterans Starting a New Business

Leveraging the **Lending Solution**, *powered by Community Capital*, a private wealth advisor helped a father-son team secure $650K in acquisition financing for the purchase of an established Arizona car wash operation.

OPPORTUNITY

Client sought acquisition financing for purchase of an operating car wash business..

RESULTS

- ✓ Evaluated financing alternatives versus liquidating investment assets
- ✓ Generated interest from more than 12 prospective lenders
- ✓ Secured financing covering over 85% of the purchase price
- ✓ Helped preserve client liquidity while supporting business ownership goal

Utilizing the Client Lending Solution powered by Community Capital, a Sequoia advisor helped a father-son team secure acquisition financing for the purchase of an established Arizona car wash operation.

A father and son formed a new LLC to acquire an Arizona-based car wash business with a purchase price of approximately $800,000. The business generated roughly $250,000 in annual revenue and approximately $100,000 in net operating income, providing an attractive opportunity for the family to build a long-term operating business together.

During discussions with the clients, the advisor identified that the buyers were considering liquidating investment assets to fund a significant portion of the purchase. Working alongside the Lending Team, the clients evaluated financing alternatives and determined that utilizing debt financing could preserve invested assets while taking advantage of borrowing costs that were expected to remain below projected long-term portfolio returns.

The financing opportunity was distributed through the Lending Solution, generating interest from more than a dozen lenders. Multiple institutions expressed interest in the transaction, providing the clients with several financing alternatives and valuable market feedback.

Ultimately, the buyers secured financing exceeding 85% of the purchase price, allowing them to preserve liquidity while completing the targeted acquisition. The process also provided the advisor with a deeper understanding of the family's business ownership objectives and long-term wealth planning goals.

> *"The financing process helped us preserve capital while moving forward with the acquisition. Having our advisor involved gave us confidence that the decision aligned with our overall financial plan."*
> - *Private Wealth Client*

COMMUNITY CAPITAL

For more information about the **Lending Solution** *powered by Community Capital*, please contact:

Lending Solutions
Dedicated Desk for Sequoia Advisors & Clients

(866) 306-3365

lendingsolutions@communityct.com