

Securities Lending

Korte is a recognized authority in the field of securities lending with a rare passion and depth of experience. A discerning member of global counsels on the subject of lending, Korte can confidently lead you through your programs to determine a solution that is right for your business.

Do you have:

- Illiquid collateral?
- Investments that may be too risky?
- Contracts that are not what you thought?
- Concerns due to additional board regulatory scrutiny?

Methodology:

- Engage Lending Agent
- Assess all securities lending programs
- Research collateral attributes and liquidity
- Independently value your portfolio(s)
- Compare loan activity and current earnings to Industry peers
- Provide comprehensive evaluation of your program including contract(s)
- Provide assessments including recommendations and actions

We guide you through your investments, your programs, your contracts, your vendors, your collateral and set you up with a comfortable solution for your future.

Customizable Solutions:

- Contract Negotiations / Renegotiations
- Vendor analysis Benchmarking, management, and relationship building
- “Auditor” type analysis for regulatory and board accountability
- Ongoing scrutiny

Today’s industry demands that you be accountable for your lending practices. Know what you have, what you are getting, and how to describe your lending programs. Be confident you have chosen the right path and the right partners.

Reports:

- Initial Evaluation
- Interviews with both internal and external parties
- Assessment of Position Report
- Summary of Lending Program
- Overview of Collateral Positions
- Contract Assessment
- Risk Report
- Final Board Reporting
- Final Discovery Report with Recommendations



K O R T E
C O N S U L T I N G

Independent Customized Financial Services Solutions
seclend@korteconsultants.com • 1.253.265.8949