

A Strategic Purchase

Our client wanted to secure a property quickly, but cash-flow timing made a traditional mortgage impractical—we **coordinated lending, investment, and liquidity** to provide an immediate solution with long-term financing flexibility.

Haggar Wealth Group

The family assumed they would have to choose between liquidating or delaying the purchase. Instead, our team helped them toward a strategy that solved both problems at the same time. It felt intentional and they knew exactly how the financing would evolve once the other property sold.



The Challenge

- **Bridge** the timing-gap between purchasing a new home and selling an existing one.
- **Preserve** long-term portfolio positioning and market exposure.
- **Maintain** flexibility to transition conventional financing at the appropriate time.

Our Approach

We coordinated lending, investment, and liquidity planning to structure a **strategic financing approach** that enabled the client to purchase the home with **\$0 down and an all-cash offer**, leveraging their balance sheet rather than selling assets.

The Outcome

1. The new home was secured immediately without disrupting the investment portfolio.
2. We avoided triggering unnecessary taxes through forced liquidation.
3. We made a seamless transition to permanent financing once the terms made sense.
4. Client **remained in alignment with their long-term financial plan** rather than making a series of isolated decisions.

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