

Folio Financial Offers Margin Borrowing with Low Rates

MCLEAN, VA, September 25, 2019 – Folio Financial, Inc. announced today that it is now offering margin borrowing with low rates starting at just 7.25% and decreasing with larger loan amounts. These are at least 2% less than Charles Schwab’s and TD Ameritrade’s published rates, as of September 25th, 2019, and are subject to change.

“Folio has been revolutionizing online investing for almost 20 years, and the way we present margin borrowing is no exception,” said Blaine McLaughlin, Chief Product Officer at Folio Financial. “We have enabled margin so that it can be supported by eligible securities in folios subscribed to models and even fractional shares allowing advisors to continue using strategies that align with our company values of diversification, cost reduction, customization, consistency, and tax minimization.”

Margin borrowing provides investors with the flexibility to access cash for short-term needs or to take advantage of investment opportunities by borrowing against the securities in eligible Folio accounts. Instead of selling securities to fund additional investments, using margin allows investors to keep their investment strategy on track and delay any capital gains or losses associated with the sale of securities while they add to their investments.

There are certain risks associated with margin borrowing. For example, if the market value of the securities falls significantly, investors need to add funds or sell securities held in their accounts to satisfy the deficit. Please refer to Folio’s [Margin FAQs](#) for more information.

“Folio’s capabilities are not restricted because you are borrowing on margin. In fact, clients and their advisors can take advantage of even more of what Folio has to offer. Offering the low margin interest rates is just the icing on the cake,” adds McLaughlin.

Please visit Folio’s [margin borrowing web page](#) for details.

About Folio Financial:

Folio Financial is an innovative market leader that owns and operates a unique self-clearing broker-dealer and FinTech company. Among its activities, Folio develops and supports digital-first investment platforms for advisors and enterprises, fully integrated with its subsidiary’s brokerage, clearing and custody solutions. Folio utilizes technology to fulfill its mission while embracing diversification and low cost as core principles, along with consistent investing, tax efficiency and personalization. Its key business segments currently are RIAs, asset and wealth managers, TAMPs, other broker-dealers and financial institutions such as banks and credit unions, as well as other FinTech firms, including robo advisors. Folio’s businesses include [Folio Institutional](#), focused on providing innovative solutions for RIAs and enterprises; [VIA Folio](#), an end-to-end investing platform for private investments available to both institutional and retail investors; [First Affirmative Financial Network](#), the leading advisor network serving the responsible investment community; [The SRI Conference and Community](#), the nation’s premier conference on impact investing; and [Folio Investing](#) and [Folio First](#) for self-directed retail investors.

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