



Is a Reverse Mortgage Right for Your Client?

Unlocking home equity can be a key component to improving retirement. **If you answer yes to any of the following questions** about your client's financial situation, a reverse mortgage may be a sensible addition to their overall retirement strategy.



Risk Management

- ✓ Does your client need more protection against long-term care events and/or unexpected expenses?
- ✓ Does your client have an existing HELOC, or have you recommended a line of credit?



Income & Investing

- ✓ Does your client still pay a mortgage?
- ✓ Does your client want/need to retire before their social security maximum benefit age?
- ✓ Is your client younger than 72, want/need additional income, and holding tax-deferred investments?
- ✓ Is your client short on paying the tax on a Roth conversion?



Home Purchasing

- ✓ Is your client considering purchasing a 2nd home and/or investment property?
- ✓ Does your client need to efficiently own 2 homes without draining invested assets (ex. divorce)?



Estate & Legacy Planning

- ✓ Is your client interested in legacy planning while still living (ex. charitable donations, trusts, funding grandchildren's education)?



Reach out to Finance of America at strategies@financeofamerica.com with any questions or to determine your client's borrowing power.

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