



the premier source for reverse mortgage education & networking opportunities
presents our

2007 Regional Meeting: Growth & Opportunities in the Reverse Mortgage Business

February 21-22, 2007
Newport Beach, CA

Presented in cooperation with the
U.S. Department of Housing & Urban Development Santa Ana Home Ownership Center

Exhibit Hours:
Wednesday, February 21, 10 a.m.- 6:30 p.m.
Thursday, February 22, 8 a.m.- 12:30 p.m.

Preliminary Agenda

Wednesday, February 21

- 9 – 11:45 a.m. **Getting Started in Reverse Mortgages**
An intensive workshop designed to help those new to the reverse mortgage business become familiar with options for participating, major aspects of loan origination and organizational management considerations.
- 9:30 – 10:30 a.m. **An Analytical Approach to Marketing:
Understanding Data Availability & Analysis to Pinpoint Areas of Opportunity**
- 10:30 – 10:45 a.m. **Morning Break**
- 10:45 – 11:45 a.m. **Raising Capital to Expand Your Reverse Mortgage Operation**
- 12 – 1 p.m. **Networking Luncheon**
- 1:15 – 2 p.m. **Major Trends & Political Issues Impacting the Reverse Mortgage Business**
Current State of The Market
Legislative & Regulatory Issues in 2007

- 2 – 2:45 Beyond HECM: Product Review of Proprietary Reverse Mortgages
- 2:45 – 3 p.m. Afternoon Break
- 3 – 4 p.m. *Concurrent Sessions*
- Hispanic Marketing: Reaching America’s Fastest Growing Demographic Group
- Becoming an FHA-Approved Lender and Expanding Your Territorial Approval
- 4 – 5 p.m. The More the Merrier: Options for Getting Information Out to Prospective Borrowers
A look at websites, advertising and lead generation programs to help you increase your market potential.
- 5 – 6:30 p.m. Networking Reception

Thursday, February 22

- 8 – 9 a.m. Continental Breakfast
- 8:30 – 9:30 a.m. *Concurrent Sessions*
- The HECM Loan Package: Understanding the Key Documents
- Participation by Brokers & Advisors in HECM Origination
- 9:30 – 11 a.m. “Town Meeting” with HUD Santa Ana Home Ownership Center
Your opportunity to meet all of the key personnel responsible for HECM program management, monitoring and enforcement at the Santa Ana HOC – and get answers to your questions on FHA policy.
- 11:15 – 12 noon *Concurrent Sessions*
- Loan Originator Roundtable
- Processor & Underwriter Roundtable
- 12 noon NRMLA Meeting Concludes

- 12:30 – 1:45 p.m. National Aging in Place Council
Western Regional Meeting & Luncheon
- Age Wave Trends:
Recognizing the Opportunities and Preparing to Cater to the
“Silver Tsunami”
- 1:45 – 2:45 p.m. Honing Your Message:
Persuading Seniors & Their Families to Pro-Actively Plan for
Aging in Place
- 2:45 – 3:30 p.m. Taking a Stand: Helping Protect Our Clients from Senior Fraud
- 3:30-4:15 p.m. Trends & Innovation in Home Modification
- 4:15-5 p.m. Networking Reception