



## Approved Courses for CRMP Credits

Due to the frequent changes in the field of reverse mortgage lending rooted both in lending practices and regulatory requirements, individuals who earn the CRMP are held to a higher educational standard.

Applicants must submit evidence on the CRMP Application that they earned 12 continuing education (CE) credits from courses approved by NRMLA or the Independent Certification Committee. After earning the designation, individuals must earn 8 credits annually to maintain their CRMP status.

### **Finance of America Reverse**

- HECM for Purchase (1 credit)
- Intent and Creation of the HECM Program (1 credit)
- Financial Assessment: Willingness and Capacity (1 credit)
- Financial Assessment: Extenuating Circumstances, Compensating Factors, and Life Expectancy Set-asides (1 credit)
- Financial Safeguards for Older Adults (1 credit)\*
- Reverse Facts (1 credit)
- Marketing and Ethics (1 credit)

You may not earn credit for this course, if you have already successfully completed Reverse Mortgage Solution's, *HECM for Purchase*.

\*This course can be applied toward the one (1) credit of continuing education in the area of elder abuse that must be completed within three (3) years of earning the CRMP designation.

#### **Contact:**

Lorraine Geraci

704-271-1957

lgeraci@fareverse.com

## **Liberty Home Equity Solutions**

- Understanding Financial Advisors (1 credit)
- Understanding the HECM LIBOR Product (1 credit)
  - Note: You may not earn credit for this course if you have successfully completed RMS' *Understanding and Selling the ARM Program*.
- Presenting to Financial Advisors (1 credit)
  - Note: It is recommended that you take *Understanding Financial Advisors* before taking this course.

**Contact:**

Jud Lyman  
916-589-3343  
judson.lyman@libertyhomeequity.com

## **Premier Reverse Closings**

- Trusts, POAs, Conservatorships and Life Estates (1 credit)

**Contact:**

Christian Fisher  
800-542-4113  
cfisher@prclosings.com

**Reverse Focus** (This is a self-paced course. A nominal fee is charged, which includes a one-year subscription to the Reverse Basics program.)

- Reverse Basics (2 credits)

Note: You may not earn credits for Reverse Basics, if you successfully completed *Reverse Mortgage Fundamentals* (offered by RMS) or *Reverse Mortgage Essentials* (offered by ReverseVision)

**Contact:**

Shannon Hicks  
800-805-9328, ext. 4  
shannon@reversefortunes.com

## **Reverse Mortgage Funding**

- Reverse Mortgage 101 (1 credit)
  - You may not earn credit for this course, if you successfully completed *Reverse Basics* (offered by Reverse Focus), or *Reverse Fundamentals* (separate courses offered by ReverseVision and Reverse Mortgage Solutions)
- Helping Your Borrower Make the Right Choice (1 credit)
- The Math Behind the HECM (1 credit)
  - You may not earn credit for this course, if you successfully completed *Reverse Mortgage Math* (offered by Reverse Mortgage Solutions)
- HECM for Purchase: Origination (1 credit)
  - You may not earn credit for this course, if you have already successfully completed *HECM for Purchase* (separate courses offered by Finance of America Reverse and Reverse Mortgage Solutions)
- HECM Product Overview/Comparison (1 credit)
- HECM to HECM Refinance (1 credit)
- HECM for Purchase Operations (1 credit)
- Qualifying the Reverse Mortgage Borrower: Income Analysis (1 credit)
- Qualifying the Reverse Mortgage Borrower: Credit Analysis (1 credit)
- Loan Servicing-What you need to know (1 credit)
- Opening the Door to Financial Planners (1 credit)
- When It's Not a Vanilla Deal (1 credit)
- Understanding Income Shortfalls and Unsatisfactory Credit (1 credit)
- Appraisals: What You Need to Know (1 credit)
- Expanding Your H4P Business (1 credit)
- LESA: What You Need to Know (1 credit)

### **Contact:**

Craig Barnes  
(845) 325-1866  
[training@reversefunding.com](mailto:training@reversefunding.com)

## **Reverse Vision**

- 2 Hour SAFE Nontraditional Mortgage: Reverse Mortgage Essentials  
(Note: This is a self-paced course worth 2 credits. A nominal fee is charged.)

Note: You may not earn credits for Reverse Mortgage Essentials, if you successfully completed *Reverse Mortgage Fundamentals* (offered by RMS) or *Reverse Basics* (offered by Reverse Focus.)

### **Contact:**

Rachel L. Smith, J.D.  
919-834-0070 x 1072  
[rachel@reversevision.com](mailto:rachel@reversevision.com)

## **Non-Reverse Courses**

### **NMLS SAFE**

Individuals seeking the CRMP designation can submit either the 8 Hour SAFE course or 20 Hour SAFE course for 3 credits.

However, once someone earns the designation, neither course is acceptable. All credits earned after attaining CRMP status must relate directly to reverse mortgages.

Please email a copy of the NMLS completion certificate to Darryl Hicks, [dhicks@dworbell.com](mailto:dhicks@dworbell.com).

### **Other Professional Designations**

Pending review and approval, up to 3 hours of credits taken in pursuit of another designation or license may be submitted toward the CRMP.

The three-day certification class that individuals must sit through to obtain the Certified Senior Advisor (CSA) designation has been approved for 3 credits.