

NRMLA's Reverse Mortgage Education Week is dedicated to teaching more people about the benefits of reverse mortgages, how they work, and how loan proceeds can be used to support aging in place.

On Thursday, April 26, NRMLA is sponsoring a free webinar called, “[*Wealth Management: Solving for Liquidity with a Reverse Mortgage*](https://www.nrmlaonline.org/2018/04/04/webinar-wealth-management-solving-liquidity-reverse-mortgage),” an online informational session for financial planners, advisors, and wealth managers.

Please encourage the financial advisors in your network to register for this [free webinar](http://bit.ly/2HyaNf3).

**What:** *Free Webinar: Wealth Management: Solving for Liquidity with a Reverse Mortgage*  
This free webinar for financial advisors will focus on incorporating home equity into a comprehensive retirement financial plan. Speakers will discuss scenarios when a reverse mortgage loan can solve for liquidity. Featured speaker Jamie Hopkins, director of the New York Life Center of Retirement Income and author of [Rewirement](https://www.amazon.com/Rewirement-Rewiring-Think-About-Retirement-ebook/dp/B07BR4TD8Y), will explain why housing wealth must be considered in a retirement financial plan.  
**When:** April 26, 2018, 4:00 - 5:00 PM ET  
**Registration:** <http://bit.ly/2HyaNf3>

**Here's a sample note you can share with the financial planners you know.**

Dear Colleague,  
  
I'm writing to let you know about an online educational session for financial planners that may interest you as you consider the needs of your retired, or nearly-retired clients. On Thursday, April 26th, the National Reverse Mortgage Lenders Association will lead a [free webinar](https://www.nrmlaonline.org/2018/04/04/webinar-wealth-management-solving-liquidity-reverse-mortgage) about using a reverse mortgage as part of an overall retirement financial plan in conjunction with its [Education Week](http://bit.ly/2pOzNYO) that runs from April 23rd-27th.

With case studies and real-life scenarios, speakers will explain how the utilization of a reverse mortgage can add more liquidity to a client’s financial plan by unlocking home equity to create tax-free cash flow.

Featured speaker Jamie Hopkins, director of the New York Life Center of Retirement Income and author of [Rewirement](https://www.amazon.com/Rewirement-Rewiring-Think-About-Retirement-ebook/dp/B07BR4TD8Y), will discuss why it’s time to change our view of the home in retirement and explain why housing wealth must be considered in a retirement financial plan. Hopkins will be joined by NRMLA Education Committee member Jud Lyman to outline strategic uses of reverse mortgages including: delaying Social Security, delaying draw downs of retirement accounts, and avoiding sequence of return risk. Certified Financial Planner Becky Bell will offer a practitioner’s perspective on situations when it makes sense to consider home equity in a long-term plan.

For more background on reverse mortgage loans, take a look at these resources and media coverage that show how the responsible use of a reverse mortgage can enhance a retirement plan:

* [Journal of Financial Planning:](https://www.onefpa.org/journal/Pages/APR16-Incorporating-Home-Equity-into-a-Retirement-Income-Strategy.aspx) “Incorporating Home Equity into a Retirement Income Strategy”
* [Video Testimonial:](https://www.reversemortgage.org/Borrowers-Stories/Personal-Financial-Columnist-Gets-Personal) Personal Financial Columnist Terry Savage Gets Personal
* [ThinkAdvisor:](https://www.thinkadvisor.com/2018/03/29/reverse-mortgages-could-be-next-hot-topic-in-retir/) “Reverse Mortgages Could Be Next Hot Topic in Retirement Planning”
* [Journal of Financial Planning:](https://www.onefpa.org/journal/Pages/MAY17-The-Effect-of-Low-Reverse-Mortgage-Literacy-on-Usage-of-Home-Equity-in-Retirement-Income-Plans.aspx) “The Effect of Low Reverse Mortgage Literacy on Usage of Home Equity in Retirement Income Plans”
* [NRMLA](https://www.reversemortgage.org/TopQuestions): “Today’s Reverse Mortgages: Flexible with a lot of built in protections”
* [Kiplinger](https://www.kiplinger.com/article/real-estate/T040-C000-S002-reverse-mortgages-that-work.html): “Reverse Mortgages That Work”
* [Wall Street Journal](https://www.wsj.com/articles/a-reverse-mortgage-to-buy-a-home-heres-how-1469026043): “A Reverse Mortgage to Buy a Home? Here’s How”
* [CBS News](http://www.cbsnews.com/news/smart-way-for-seniors-to-tap-home-equity/): "A Smart Way for Seniors to Tap Home Equity"
* [Chicago Tribune](http://www.chicagotribune.com/business/sns-tns-bc-pfp-journey-20170313-story.html): “Can a Reverse Mortgage Stabilize a Wobbly Retirement-Income Stool?”
* [Forbes](https://www.forbes.com/sites/wadepfau/2017/02/21/using-reverse-mortgages-in-a-responsible-retirement-income-plan/#62fc1f2e35e5): “Using a Reverse Mortgage in a Responsible Retirement Income Plan”
* [Kiplinger](http://www.kiplinger.com/article/real-estate/T040-C032-S014-why-reverse-mortgages-are-worth-a-look.html): “Why Reverse Mortgages are Worth a Look”

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*Webinar participants seeking recertification through the American College, may claim 1 Hour of CE credit towards the CLU, ChFC, or RICP designations.*

If you have questions before or after the event, I’d be happy to meet with you to provide additional information.

Thank you,