



# Financial Professional Reverse Mortgage Questionnaire

The following questions can help you assess if a reverse mortgage may be right for your clients.



## 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)?

### Let's Strategize!

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