

Current Reverse Mortgage Holders

Over the past three decades, we have helped many clients through different stages of homeownership—from purchasing their first home to financing move-up properties. More recently, many of those same clients, along with our family and friends, have begun asking us about senior-focused financing options such as Reverse Mortgages.

That prompted us to do a very deep and comprehensive review of these products so we could help ensure that the people we have served for years receive informed, objective guidance.

What we found was important: Reverse Mortgage programs have improved significantly, but borrowers are not always matched with the product or structure that best fits their current needs. We also discovered that most seniors are not being informed of important considerations that could have significant implications for them.

Our priority is to help improve the lives of seniors, whether or not they need our assistance with a new loan. If someone already has a Reverse Mortgage, we are still available to review their situation, answer questions, and make sure they understand the important considerations we discuss with our own clients.

We are developing additional resources specifically for current Reverse Mortgage holders. In the meantime, if you know someone who could benefit from this information, please feel free to connect them with us.