



Reverse Mortgage Industry

Company & Industry Perspectives

Life Stages Financial

Reverse Mortgage Industry – Past / Present / Future

- RM 1.0 – Prerequisite
- RM 2.0 – Introductory
- RM 3.0 – Intermediate
- RM 3.5 – Accelerated Study
- RM 4.0 – Advanced
- RM 5.0 – Graduate Studies

Company Prospects

- Traditional Versus Transformational
- Channels
 - Advisor
 - Broker / Correspondent
 - Retail
 - Alternative
- Business Versus Social Missions

Industry Issues

- Product Perceptions
 - 'Expensive' Fees & Costs
 - Next Subprime?
- Customer Protections
 - Market Entrants
 - Independent Counseling
 - Full Disclosure
 - Deceptive & Aggressive Advertising
 - Inappropriate Cross-Selling

Association Roles

- Associations
 - MBA
 - NRMLA

- Roles
 - Best Practices
 - Outreach

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