

Lead Sourcing

Go FAR Guide



FINANCE of AMERICA
— REVERSE —

There's no need to buy expensive leads when you can discover potential clients at no cost! Follow these steps to build your reverse book of business:



STEP REVIEW YOUR EXISTING CLIENTS AND PROSPECTS

1

- **Non-Qualified/Turn Down Leads**
 - » Customer that previously applied for a forward or reverse and didn't qualify.
 - » Leads you spoke with but did not have a product that fit their needs.
- **Previously Closed Loans**
 - » Forward customers you helped that are now over 60/62* years old.
 - » Reverse customers funded over 18 months ago may now qualify for a refinance.



STEP GET NEW REFERRAL PARTNERS AND LEADS IN YOUR AREA

2

- Check home listing websites like **Realtor.com** or **Zillow** and connect with local realtors.
- Partner with banks, 55+ community homebuilders, title companies, CPAs and tax planners, and elder care attorneys to expand your network!
- Use **FPA.com** to find financial advisors and add them to the Financial Planner email journey in Total Expert to educate them on home equity in retirement.

PRO TIP: Use pre-qualifying filters in your database to see clients where the youngest borrower is 60/62* or older, the home is their primary residence with at least 50% equity, and the borrower has no delinquent federal debt.

TOTAL EXPERT USERS

These marketing materials are available for you to use in your account:

- Financial Planner email journey • Realtor email journey
- Dozens of borrower emails, postcards and flyers, and social media posts with your company logo and contact

LOG IN TO TOTAL EXPERT

For questions email Xcelerate@fareverse.com Request Total Expert login access [here](#)

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*For certain HomeSafe® products only, excluding Texas and Utah where the minimum age is 62. There is a financial assessment when applying for a reverse to determine whether the applicant has the willingness and capacity to afford reverse mortgage obligations including property taxes, homeowners insurance, and other property charges they might have. If the lender finds that a loan applicant does not have adequate cash flow to uphold the mandatory obligations of the reverse mortgage, they may require what is known as a Life Expectancy Set-Aside, or a "LESA," for short. For business and professional use only. Not for consumer distribution. These materials are not from HUD or FHA and were not approved by HUD or a government agency. ©2021 Finance of America Reverse LLC is licensed nationwide | Equal Housing Opportunity | NMLS ID # 2285 (www.nmls.consumeraccess.org) | 8023 East 63rd Place, Suite 700 | Tulsa, OK 74133 | AZ Mortgage Banker License #0921300 | Licensed by the Department of Business Oversight under the California Residential Mortgage Lending Act | Georgia Residential Mortgage License #23647 | Kansas Licensed Mortgage Company | Massachusetts Lender/Broker License MC2285: Finance of America Reverse LLC | Licensed by the N.J. Department of Banking and Insurance | Licensed Mortgage Banker -- NYS Banking Department where Finance of America Reverse is known as FARreverse LLC in lieu of true name Finance of America Reverse LLC | Rhode Island Licensed Lender | Not all products and options are available in all states | Terms subject to change without notice | For licensing information go to: www.nmlsconsumeraccess.org