



Speaker:
Jamie Hopkins, Esq., LLM, MBA, CFP®, RICP®, is the Director of Retirement Research at Carson Wealth, the Managing Director of Carson Coaching, and a Finance Professor of Practice in the Heider College of Business at Creighton University. He is a former professor of Taxation at The American College, where he helped co-create the Retirement Income Certified Professional® (RICP®) education program.

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How To Talk To Clients & Compliance Officers About
Home Equity & Reverse Mortgage Loans in Financial Planning

How do you talk to compliance and clients without getting in trouble!

SEPTEMBER 16TH, 2020 | 10:00 AM MST

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TOPICS

- Retirement cash flow strategies using reverse mortgages
- The 5 step process of loan officers and financial planners working together to change retirements for the better!
- What percentage of your client's wealth is in their home?
- What questions should you be asking your clients?
- Working with Compliance and understanding your Fiduciary risks

About the SPEAKER

*In Jamie Hopkins Investment News article, he said:
 "In my opinion, not including home equity and reverse mortgages in the financial planning process is the largest failure of the financial services profession at this time."*

Because you care about your clients: From a liability and fiduciary perspective– you really cannot afford to NOT talk about \$7.1 Trillion in clients' homes over the age of 62 with all the research and undeniable facts about the proper use of home equity.



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