HECM Tool Email Swipe File for Financial Advisors

Email 1: Payoff Mortgage + Line of Credit

Subject: Help Your Retired Clients Eliminate Payments + Add a Growing Line of Credit

Hi [Advisor Name],

I recorded a quick video showing how one of your retired clients could eliminate their mortgage payment and unlock a growing line of credit—all while preserving their investment portfolio.

In this scenario, the client:
- Paid off a $300K mortgage using a reverse mortgage
- Freed up $1,800/month in cash flow
- Gained access to an $80K+ line of credit that grows over time

I've attached the HECM Tool Report (PDF) to show you exactly how the numbers work.
🎥 [Insert video link]

Would you be open to a 15-minute Zoom? We can walk through the tool together and explore whether this could benefit any of your clients right now.

👉 [Insert calendar link] to book a time
Do you have anyone in mind already?

Best regards,
[Your Name]
[Your Title & NMLS]

Email 2: Short-to-Close with Cash Injection

Subject: Reverse Strategy to Eliminate Mortgage with a One-Time Cash Injection

Hi [Advisor Name],

This quick video outlines a real client scenario where the reverse mortgage didn't fully cover their traditional mortgage—but still made excellent sense.

Here's how it worked:

- The client had a $450K traditional mortgage
- Reverse proceeds covered $300K
- They brought in $150K to close
- Eliminated a $2,200/month mortgage payment

Even with a short-to-close, the monthly cash flow and retirement impact made this a smart move.
I've attached the HECM Tool Report (PDF), and you can watch the full walk-through here:
🎥 [Insert video link]

Would this strategy be helpful for any clients in your book? Let's talk it through.

👉 Book a Zoom: [Insert calendar link]
I'd love your feedback.

Warmly,
[Your Name]
[Your Title & NMLS]

Email 3: Reverse for Purchase to Retain Investments + Boost AUM

Subject: Home Purchase Strategy That Preserves Retirement Accounts + Increases AUM

Hi [Advisor Name],

Ever had a client withdraw a large sum to buy a home in retirement?

This 3-minute video shows a smarter way to do it—using a Reverse for Purchase strategy to:
- Buy a new home without drawing from investment accounts
- Eliminate the need for monthly payments
- Keep retirement funds intact (and under your management)

In this case, the client boosted their purchasing power without touching their portfolio.
I've attached the HECM Tool Report PDF with side-by-side numbers for clarity.
🎥 [Insert video link]

Would you be open to a quick Zoom to see how this works live?
👉 [Insert calendar link]
And—are there any clients this could work for right now?

Talk soon,

[Your Name]
[Your Title & NMLS]