

Finding New Lead Sources

Some of the ideas we present here may be new or a reminder of someone, or someplace, you should be in touch with. Many people need the financial help that reverse mortgages can provide to them, especially now.

- **NATIONAL ACADEMY OF ELDER LAW ATTORNEYS (NAELA) WWW.NAELA.COM**

You can use the “Find a Lawyer” feature to find members near you. The designation CELA (Certified Elder Law Attorney) may be a good indicator.

- **AMERICAN SOCIETY ON AGING (ASA) WWW.ASAGING.ORG**

This and other Aging and Senior organizations may sometimes need a reverse mortgage specialist. Also, a terrific networking opportunity for other senior serving professionals.

- **LOCAL SENIOR ORGANIZATIONS**

Your local community (town or village or city) probably has a senior organization that provides social, financial, and personal information for your senior neighbors, etc.

- **LOCAL GOVERNMENT OFFICES**

Your local legal aid department, assessor, tax collector, or Town Clerk, etc. should know about what you do. When the need comes up, YOU want to be the person they think of and reach out to.

- **LINKEDIN WWW.LINKEDIN.COM**

This is primarily for creating business connections for referrals. However, as many of us know, often our referral partners and their families become our customers as well. There are plenty of resources at your company, or online, to improve or establish your LinkedIn presence.

- **FUNERAL PARLORS**

Letting your local funeral directors know what you do, and possibly about how reverse mortgages work, may be a way for families to find another possible solution to financial needs.

- **FINANCIAL ADVISORS WWW.NAPFA.ORG WWW.CFP.NET**

There are many organizations and designations for financial professionals. Registered Investment Advisors (RIA) and Certified Financial Planners (CFP) may be more receptive to reverse mortgages initially, than others.

- **LOCAL BUSINESS ORGANIZATIONS WWW.BNI.COM WWW.CHAMBEROFCOMMERCE.COM WWW.NEXTDOOR.COM**

It might seem obvious, but belonging to, and participating in, your local business organization has paid off for many loan officers.

- **LOCAL BUILDERS’ ASSOCIATIONS WWW.NAHB.ORG**

The National Association of Home Builders is one group, but there may be multiple local builders’ groups that should know who you are and what you do. Related to this are Certified Aging in Place Remodelers.

- **NATIONAL ASSOCIATION OF REALTORS (NAR) WWW.NAR.REALTOR**

There are realtor groups all over the country. They just might be a source of leads for reverse mortgages. The designation SRES (Senior Real Estate Specialist) should be on your radar.

<https://seniorsresource.realtor/>

▪ **CONDOMINIUM ASSOCIATIONS** [FHA CONDO LOOKUP](#)

This site will tell you if a condo association is approved, has expired, was denied, or hasn't even applied to be approved for HECMS. It may provide an opportunity for your service in getting it approved and providing financing for the owners.

▪ **SENIOR COMMUNITIES** [WWW.55PLACES.COM](#) [WWW.ACTIVEADULTLIVING.COM](#)

You might think these are only in Florida, Arizona, and other warm climate states. They are all over the country and YOU could be their reverse mortgage person. There are many other websites to help you find them. The management companies might help with people who need help paying their dues.

▪ **ACCOUNTANTS AND TAX PREPARERS**

You may not want to approach these professionals during April or right after, but this certainly is a group that may have clients who could use your services.

▪ **VETERANS ORGANIZATIONS** [WWW.VFW.ORG](#) [WWW.LEGION.ORG](#)

Many people who served in the armed forces are now of age to qualify for a HECM. Making yourself known to these groups can be a service to them.

▪ **CHARITABLE, RELIGIOUS, AND CIVIC ORGANIZATIONS**

[WWW.MEALSONWHEELSAMERICA.ORG](#) [WWW.LIONSCLUBS.ORG](#)

We are not suggesting you join one of these organizations or groups to try and get business, but when you are involved in your community the needs of others will come to your attention.

▪ **ADULT DAY CARE** [WWW.CARE.COM](#) [WWW.AARP.ORG](#)

There is a cost to this type of care. Maybe home equity is the way to help.

▪ **RESORT COMMUNITIES**

Believe it or not, ski bums and others who bought homes in these areas years ago might now benefit by being able to tap the equity they have built up as home values here have shot up. Their primary homes, or course.

Tips and Reminders

- It is unlikely that just one source of leads and referrals will provide your entire business.
- Bulk mail and/or bulk email has a very small likelihood of producing many results.
- You will need to establish personal, face to face relationships in most cases with your referral partners.
- Some of these may not be in your community or meet your interests or business model.
- There are many other possible sources for you to discover and cultivate.
- This is not a complete list even within the ideas we have provided. Your community or area will have its own related organizations and groups.