Mutual of Omaha
REVERSE WHOLESALE

COURSE DESCRIPTIONS

Certified Reverse Mortgage Professional (CRMPs) – Last Quarter Offering CRMP Credits

Mutual offers 7 CRMP classes. These classes are indicated below with the CRMP logo. The type of credit is indicated below the course description. To receive CRMP credit you must:

- Attend the entire class and answer all polling questions
- Certificates are emailed at the end of each week.
- Submit CRMP Certification of Completion to NRMLA.
- For more information about the CRMP designation click HERE

Express Train

Express Train webinars last 15 minutes or less. Look for the icon on our calendar.

1. New: Repair Set Asides
2. It's Back: Due and Payable Events
3. Quantum Reverse's Loan Simulator
4. Calculating Initial Distribution Limits
5. The Counseling Process
6. HECM vs. SecureEquity®
7. Reading a Rate Sheet

More Training Opportunities

Mutual Reverse Academy - Get access to our training courses anytime, allowing you to learn at your own pace. After completing each course, you can take a quiz and earn a certificate of completion. Contact your AE or PSA to get enrolled in Mutual Reverse Academy.

Partner Portal – The training section of our partner portal houses all of our training videos that you can view or download at anytime.

SecureEquity
Powered by Mutual of Omaha Mortgage

MUTUAL'S PROPRIETARY REVERSE

Join us to learn about our jumbo proprietary reverse. We'll discuss features, availability and advantages. We'll also compare numbers on each product type.

CONDO APPROVAL

Learn the steps to get your client's condo approved with Mutual. We'll discuss how simple it is to get a condo approved, especially if the condo is already approved by FHA, FNMA, or other agency.

REVERSE PURCHASES SERIES

A 3-part series (30 minutes each). Attend one, two, or all 3! Part I discusses the market and the importance of the senior market, Part II reviews the basics of purchases and Part III exams loan scenarios and entering them in QR.

REVERSE REFINANCES

We'll explore when refinancing makes sense—and when it may not. We'll review the financial "tests" a loan should pass in order to provide a real benefit. We'll also cover calculating MIP on a new loan and the information you'll need from the original loan.

COURSE DESCRIPTIONS (CONT.)

APPRAISAL REVIEW

Our new class will review the appraisal report and identify red flags, review comps and appraiser comments. We will also review the appraisal ordering process.

THE BASICS OF QUANTUM REVERSE

Learn how to enter a new lead, change payment plans, create proposals and applications and complete key fields & screens.

LIFE EXPECTANCY SET ASIDES

Discusses the differences between partially and fully funded LESAs and using compensating factors and extenuating circumstances to avoid them. We'll also discuss their advantages.

HECM MATH

Learn about initial and expected rates, payment plan calculations and the math behind key disclosures. Hear about loan growth and compare loan growth using multiple indices.

REVERSE MORTGAGES FOR NEWCOMERS

Unlike our traditional RM Basics, it compares reverse terms to forward terms, how to simplify reverse concepts and answer questions. Also covered, basic eligibility and obstacles.

NON-BORROWERS

Learn about eligible and ineligible non-borrowing spouses, non-borrowing owners and household members and signing, counseling and income requirements.

1 Basic CRMP credit

NO PROBLEMS, ONLY SOLUTIONS!

It's important to remember that HECMs provide a sustainable solution for many potential borrowers. This class will talk about suggested uses of a HECM like paying off debt, buying a home, paying off a HELOC and more.

1 Advanced CRMP credit

REVERSE MORTGAGE BASICS

New to reverse mortgages? Join us to learn about the industry, HUD guidelines, eligibility, terms, products, and best practices.

1 Basic CRMP credit

REVERSE MORTGAGE SERVICING

This session will cover the responsibilities of Loan Servicing including Borrower responsibilities, payments, repairs, LESA, and end of loan requirements.

1 Advanced CRMP credit

LINES OF CREDIT AND PREPAYMENTS

Get more in-depth knowledge on calculating LOCs, IDLs and LOC growth. We'll also compare HELOCs to HECM LOCs and see how powerful partial prepayments can be.

1 Advanced CRMP credit

ALL DEALS AREN'T CREATED EQUAL

Discusses general guidelines regarding borrowers and deed and title issues including non-borrowing spouses and property owners, POAs, bankruptcy, Life Estates, Trusts and more. Also discuss ADUs and Solar Leases!

1 Advanced CRMP credit

GETTING THE DEAL TO WORK

Join us to review how Compensating Factors, Asset Dissipation, and Extenuating Circumstances are used to overcome income and credit issues. We'll discuss LESAs and LOEs too.

1 Basic CRMP credit

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October 2026

Monday	Tuesday	Wednesday	Thursday	
Please DOWNLOAD the calendar to click the registration links				
September 28 Appraisal Review 2:00ET/11:00PT	**September 29** QR's Loan Simulator 12:00ET/9:00PT SecureEquity® - Mutual's Proprietary Reverse 4:00ET/12:00PT	**September 30** Reverse Mortgages for Newcomers 3:00ET/12:00PT	**1** Express Train: The Counseling Process 12:00ET/9:00PT No Problems, Only Solutions 3:00ET/12:00PT	
5 Reverse Mortgage Basics 2:00ET/11:00PT	**6** Non-Borrowers 3:00ET/12:00PT	**7** Let's Grow This: SecureEquity® Product Update: Unlock More Opportunities to Grow Your Production 2:00ET/11:00PT	**8** Reverse Mortgage Servicing 2:00ET/11:00PT Express Train: Due and Payable Events 4:00ET/1:00PT	
12 Reverse Purchase Part I 4:00ET/1:00PT	**13** Reverse Purchase Part II 4:00ET/1:00PT	**14** Reverse Purchase Part III 4:00ET/1:00PT	**15** SecureEquity® - Mutual's Proprietary Reverse 4:00ET/1:00PT	
19 LIVE in Las Vegas: NAMB CREV Certification 9:00-4:00. Register HERE, use **MUTUALFREE** for complementary conference registration	**20** No live classes scheduled – See Recorded Training in the Training section of our Partner Portal.	**21** Let's Grow This: From Database to Closed Loan: Email Marketing That Works 2:00ET/11:00PT	**22** LOC and Prepayments 2:00ET/11:00PT Express Train: Reading a Rate Sheet 4:00ET/1:00PT	
26 Express Train: HECM vs. SecureEquity® 12:00ET/9:00PT HECM Math 2:00ET/11:00PT	**27** Mutual's Condo Approval Process 1:00ET/10:00PT All Deals Aren't Created Equal 3:00ET/12:00PT	**28** Reverse Refinances 2:00ET/11:00PT Express Train: QR's Loan Simulator 4:00ET/1:00PT	**29** The Basics of Quantum Reverse 3:00ET/12:00PT	

DETAILS

TIME ZONES
All times are Eastern time zone. -1 for Central, -2 for Mountain, -3 for Pacific time zones.

TIMING
All classes are approximately 60 minutes in length. Express Train classes are less than 15 minutes.

REGISTRATION
Click on the course name and date to register for a session.

CRMP CREDITS
CRMP courses are indicated by the CRMP logo. Certificates are emailed at the end of each week.

TRAINING MATERIALS AND RECORDINGS
Classes will be recorded. Recordings and materials will be distributed within a few days of the session's conclusion.

TRAINING QUESTIONS?
Contact Craig Barnes at cbarnes@mutualmortgage.com. For customized training solutions contact your Account Executive.

Mutual of Omaha REVERSE WHOLESALE

November 2026

Monday	Tuesday	Wednesday	Thursday	
Please **DOWNLOAD** the calendar to click the registration links				
2 Reverse Mortgages for Newcomers 2:00ET/11:00PT	3 SecureEquity® - Mutual's Proprietary Reverse 2:00ET/11:00PT	4 Let's Grow This: 5 Marketing Compliance Do's & Don'ts Every Mortgage Professional Should Know 2:00ET/11:00PT	5 Express Train: Repair Set Asides 12:00ET/9:00PT No Problems, Only Solutions 3:00ET/12:00PT	
9	10	11	12	
No live classes scheduled – See Recorded Training in the Training section of our Partner Portal.				
16 Reverse Mortgage Basics 2:00ET/11:00PT	17 Appraisal Review 2:00ET/11:00PT Express Train: Due and Payable Events 4:00ET/1:00PT	18 Non-Borrowers 1:00ET/10:00PT Express Train: Reading a Rate Sheet 3:00ET/12:00PT	19 Reverse Mortgage Servicing 2:00ET/11:00PT	
23 SecureEquity® - Mutual's Proprietary Reverse 2:00ET/11:00PT	24 Life Expectancy Set Asides 2:00ET/11:00PT	25 Express Train: Calculating IDL 12:00ET/9:00PT Getting the Deal to Work 2:00ET/11:00PT	26 **Thanksgiving Day – Mutual Offices Closed today and Friday, November 27th**	
30 The Basics of Quantum Reverse 2:00ET/11:00PT Express Train: HECM vs. SecureEquity® 4:00ET/1:00PT				

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December 2026

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Monday	Tuesday	Wednesday	Thursday
	1 Mutual's Condo Approval Process 3:00ET/12:00PT	2 Reverse Refinances 2:00ET/11:00PT Express Train: QR's Loan Simulator 4:00ET/1:00PT	3 No Problems, Only Solutions 2:00ET/11:00PT
7 Express Train: The Counseling Process 12:00ET/9:00PT HECM Math 3:00ET/12:00PT	8 SecureEquity® - Mutual's Proprietary Reverse 2:00ET/11:00PT	9 Express Train: Repair Set Asides 4:00ET/1:00PT	10 Reverse Mortgages for Newcomers 3:00ET/12:00PT
14 Reverse Purchase Part I 2:00ET/11:00PT Express Train: Calculating IDL 4:00ET/1:00PT	15 Express Train: Due and Payable Events 12:00ET/9:00PT Reverse Purchase Part II 2:00ET/11:00PT Appraisal Review 4:00ET/1:00PT	16 Reverse Purchase Part III 2:00ET/11:00PT	17 Express Train: Reading a Rate Sheet 12:00ET/9:00PT Reverse Mortgage Basics 3:00ET/12:00PT
21 Reverse Mortgage Servicing 2:00ET/11:00PT	22 Lines of Credit and Prepayments 2:00ET/11:00PT	23 The Basics of Quantum Reverse 1:00ET/10:00PT	24 Christmas Eve – Mutual Offices Open, Mutual Offices closed Friday, December 25th.
28 SecureEquity® - Mutual's Proprietary Reverse 2:00ET/11:00PT	29 All Deals Aren't Created Equal 2:00ET/11:00PT	30 Getting the Deal to Work 2:00ET/11:00PT	31 New Year's Eve – Mutual Offices Open, Mutual Offices closed Friday, January 1st.

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