CLIENT ASSESSMENT INTAKE/REVIEW

For internal use only

Name(s) of client: ______________________________

Date of assessment: ______________________________

- ❑ Yes ❑ No 1. Does the client still have a mortgage payment?
- ❑ Yes ❑ No 2. Does the client want/need to retire before their social security maximum benefit age?
- ❑ Yes ❑ No 3. Is the client considering moving, or purchasing a 2nd home or investment property?
- ❑ Yes ❑ No 4. Does the client have an existing home equity line of credit (HELOC)?
- ❑ Yes ❑ No 5. Does the client need a stable income stream or alternative funding source when investments are underperforming?
- ❑ Yes ❑ No 6. Does the client need adequate protection against long term care events or unexpected expenses?
- ❑ Yes ❑ No 7. Are you concerned inflation might hinder your client's overall financial plan?
- ❑ Yes ❑ No 8. Is the client facing divorce, with the need to establish housing options for both spouses without draining invested assets?
- ❑ Yes ❑ No 9. Does the client need tax-free income or tax bracket management strategies?
- ❑ Yes ❑ No 10. Does the client have a portfolio to preserve and/or make last longer?

Did you answer "YES" to any of the questions above?

If so, then please contact me to further explore how the New Reverse Mortgage, also known as the Home Equity Conversion Mortgage (HECM), may improve your client's overall financial plan.

Let's Chat

Mutual of Omaha MORTGAGE

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