

REVERSE MORTGAGE MARKETING: WHERE TO START

A Quick-Start Guide for Mortgage Brokers

STEP 1: BUILD YOUR FOUNDATION

Before marketing, make sure your basics are solid:

- Optimize your LinkedIn and Facebook profiles
(position yourself as a retirement resource, not just a loan officer)
- Create a simple landing page or website section explaining reverse mortgages in plain language
- Gather 5-10 testimonials or reviews to build trust

STEP 2: MARKETING QUICK START

Host Local Events

Position yourself as the local expert: Lunch & Learn sessions, Retirement workshops, Business partner events. Keep it simple, educational, and pressure-free.

Source Your Audience

Companies, like TitlePro247, allow you to build targeted mailing lists based on property and homeowner data—so you're inviting the right people to your event, not just a general audience.

Event Topic Ideas

- Retirement education seminars
- "Understanding Home Equity in Retirement"
- "Reverse Mortgage Myths vs. Facts"
- "Aging in Place Using Home Equity"

Get Started with Meta (Facebook)

Focus on Relationships, Not Sales. Your audience (especially 50+ homeowners) is there to learn and connect, so educate, don't pitch. Showing up as a resource, not a salesperson is the quickest way to build credibility and position yourself as the expert.

Lead with Education-Based Marketing

Content ideas:

- "Common Myths vs. Facts"
- "Ways to Use Home Equity in Retirement"
- Short videos answering FAQs

Outlets:

- Social media (LinkedIn + Facebook)
- Email newsletters
- Testimonials
- Short educational videos

Watch our webinar:

Understanding How Property & Title Information Is Used in Market Research



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Watch our webinar:

Events: Grow Your Market Presence Without Cold Calling



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Build Your Audience

- Invite your personal network to like your page
- Mention your Facebook presence in conversations with clients and partners
- Engage in local Facebook groups
- When someone engages with your post, invite them to like your page—they're already interested.

Easy Content Ideas

- "Did you know?" facts about home equity or retirement
- Reverse mortgage myths vs. facts
- Short videos answering common questions
- Client success stories (requires written permission)

Email Marketing

The 55+ audience values clarity, trust, and relevance over volume. Start with 1-2 emails per month. To stay top-of-mind as a helpful resource, not just a lender.

Focus on what matters to them:

- Retirement cash flow & stability
- Reducing financial stress
- Aging in place

Easy content ideas:

- "Did you know?" insights
- Myths vs. facts
- Short scenarios or customer testimonial videos
- Event invitations

Watch our webinar:

Getting Started with Meta (Facebook) Marketing for Mortgage Professionals



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CAN-SPAM ACT Requirements

- Include a clear unsubscribe link in every email
- Honor opt-out requests within 10 business days
- Use accurate "From," "To," and reply-to information
- Avoid misleading or deceptive subject lines
- Clearly identify the message as an advertisement
- Include your physical mailing address (business address)

Consult the FTC's Can-SPAM Act requirements to ensure you're in compliance.

<https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business>

STEP 3: PARTNER WITH A TEAM THAT DELIVERS THE TRAINING, MARKETING SUPPORT, AND ONGOING GUIDANCE YOU NEED TO GROW WITH CONFIDENCE.

At Mutual of Omaha Reverse Wholesale, your success is our priority. That's why we created the Let's Grow This! Webinar Series—designed to provide practical marketing strategies and real-world insights to help you expand your business. We're also proud to partner with the National Association of Mortgage Brokers (NAMB) to support their Certified Reverse Mortgage Specialist (VREV) certification, helping you build credibility and deepen your expertise in the reverse mortgage space.

