

Surefire

Reverse Marketing Educational Workflow Series

GMFS Marketing - GMFS Wholesale
Handbook Created: April 17, 2024

WELCOME

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marketing@gmfslending.com

8 Workflow Actions Pipeline

Types indicated with * have samples included in this handbook.

Type	Timing	Event Details	For
1 Send Email*	Immediately	SimpleReverse Marketing Campaign - Intro - copy	Contact
2 Send Email*	28 days	SimpleReverse Marketing Campaign - Email 1 - copy	Contact
3 Send Email*	56 days	SimpleReverse Marketing Campaign - Email 2 - copy	Contact
4 Send Email*	84 days	SimpleReverse Marketing Campaign - Email 3 - copy	Contact
5 Send Email*	112 days	SimpleReverse Marketing Campaign - Email 4 - copy	Contact
6 Send Email*	140 days	SimpleReverse Marketing Campaign - Email 5 - copy	Contact
7 Send Email*	168 days	SimpleReverse Marketing Campaign - Email 6 - copy	Contact
8 Send Email*	196 days	SimpleReverse Marketing Campaign - Email 7 - copy	Contact

Email Sample: SimpleReverse Marketing Campaign - Intro - copy

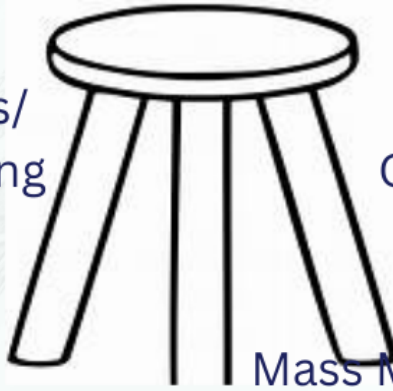
From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : Implement Your 2024 Reverse Mortgage Marketing Campaign NOW! - SimpleReverse Can Help!!!



THE 3 LEGGED STOOL OF REVERSE MORTGAGE MARKETING!



Referrals/
Networking

Past
Customers

Mass Marketing

SR SimpleReverse
POWERED BY GMFS



NMLS 64997

Now that we are full swing into the new year, it is time to implement your 2024 reverse mortgage marketing campaign as you look to make 2024 the YEAR of REVERSE MORTGAGES!

Here at SimpleReverse, we have a great deal of tools and ideas to help you grow your reverse mortgage business this year! The first step is to develop a strategy to grow your business and then to put it to work. Each month, we will highlight each leg of the marketing stool highlighted above as we work to help you grow your business with successful, time-tested strategies that work!

Overview of the 3-Legged Reverse Mortgage Marketing Stool:

1. **Past Customers** - reach out to all of your past and existing customers to let them know that you offer reverse mortgages and what the benefits are
2. **Referrals/Networking** - reach out to your current and future referral partners with the benefits of reverse mortgages and how they can help them grow THEIR business'
3. **Mass Marketing** - reach out directly to potential customers through marketing avenues like social media, print, direct mail, radio, tv, etc...

If you want to learn more now about implementing any of these strategies to help grow your reverse mortgage business, reach out to me TODAY! Otherwise, stay tuned over the coming days and weeks as we highlight each of these strategies and give you some concrete ways to implement them to help you grow your reverse mortgage business this year!

And, if you aren't currently even offering reverse mortgages to your customers, call me NOW to learn how we can help you add this great product and new marketing opportunity to your business NOW!!

[Read our entire Reverse Marketing Educational Series here.](#)

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7389 Florida Blvd Suite 200A | Baton Rouge, LA 70806

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Email Sample: SimpleReverse Marketing Campaign - Email 1 - copy

From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : SimpleReverse Marketing Minute: You Have Potential Reverse Mortgage Customers Now! - Who Are They?



You Have Potential Reverse Mortgage Customers.... Who Are They?

Customers Age 62+ Who Are:

- *Looking for additional monthly income*
- *Looking to eliminate their monthly mortgage payments*
- *Unable to qualify for a traditional loan or HELOC*
- *Looking to purchase a new home*
- *Looking to age-in-place and need to do home improvements*
- *Having cash flow problems*
- *Just looking for additional \$\$\$ to better enjoy retirement!*

NMLS 64997

SR SimpleReverse
POWERED BY GMFS



Welcome to the 1st edition of the SimpleReverse Marketing Minute!

This week we are going to look at who is a potential reverse mortgage customer. Whether or not you know it, you already do have potential reverse mortgage customers either in your database currently or that you are talking to today. **So, who are these potential reverse mortgage customers?**

Reverse Mortgage Customers are Age 62+ who are:

- * Looking for additional monthly income
- * Looking to eliminate their monthly mortgage payments
- * Unable to qualify for a traditional loan or HELOC
- * Looking to purchase a new home OR right-size their home with an alternative to an "all cash" purchase
- * Looking to age-in-place and need to do home improvements
- * Having cash flow problems
- * Looking to create that emergency fund through a line of credit
- * Just looking for additional \$\$\$ to better enjoy retirement

Basically, any senior age 62+ who is looking to access additional money, eliminate debt or purchase a new home through the use of home equity!!

If you want to learn more now about these potential reverse mortgage customers and how to find them, stay tuned for the next edition of the [SimpleReverse Marketing Minute](#) as we explore the different marketing strategies, or **give me a call TODAY and we can discuss implementing a customized reverse mortgage marketing strategy for YOU!!**

And, if you aren't currently even offering reverse mortgages to your customers, call me NOW to learn how we can help you add this great product and new marketing opportunity to your business TODAY!!

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Email Sample: SimpleReverse Marketing Campaign - Email 2 - copy

From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : SimpleReverse Marketing Minute (Volume 2): Leg 1 of the Marketing Stool - Reach Out to Your Past Customers!



Welcome to the 2nd edition of the SimpleReverse Marketing Minute!

This week we are going to take a closer look at **Leg 1 of the Reverse Mortgage Marketing Stool....Past Customers!**

Now, your first thought might be that you don't have past customers who are age 62 or older and eligible for a reverse mortgage. ***BUT, ALL OF YOU DO HAVE PAST CUSTOMERS!*** *And, all of those past customers have parents and/or grandparents or friends who ARE eligible and potential reverse mortgage customers!*

So, the first and easiest strategy is to reach out to all of your past customers to let them know that you now offer reverse mortgages by introducing them to the benefits of this program. The best way to do this is by adding a section on reverse mortgages to your regular monthly/quarterly newsletter (*I am assuming that all of you have some kind of regular email newsletter or marketing update that you sent to your past customers. If you don't, I would strongly encourage that you start. There are several vendors that can assist with this, or give me a call and we can discuss a strategy!*).

I would suggest that you add a regular section on reverse mortgages moving forward. Maybe a deployment strategy of:

- 1. First Update - Quick intro that you now offer this great equity release program for seniors and what they are and are not*
- 2. Second Update - Highlight some of the types of customers who can benefit from this program*
- 3. Third Update - Highlight some of the benefits of the reverse mortgage program*
- 4. Fourth Update - Give an example of an actual scenario how/why a senior benefitted from a reverse mortgage*

And then, you can build out more scenarios, customer testimonials or additional content from there. If you need help building out this strategy or need help with the content, just let me know and we can create a customized strategy for you and your customers.

Let me know if you want help putting this together or if you need help with the content. I have a lot of suggestions, thoughts, content and ideas to help. **Reach out to me today for help with putting this first marketing idea to work for you!**

And, if you aren't currently even offering reverse mortgages to your customers, call me NOW to learn how we can help you add this great product and new marketing opportunity to your business TODAY!!

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Email Sample: SimpleReverse Marketing Campaign - Email 3 - copy

From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : SimpleReverse Marketing Minute (Volume 3): Network with Realtors (Reverse for Purchase)!



Welcome to the 3rd edition of the SimpleReverse Marketing Minute!

This week we are going to focus on **Leg 2(a) of the Reverse Mortgage Marketing Stool....Referral Partners - Focusing on Realtors and the Reverse for Purchase product!**

We have been talking for months about the HUGE OPPORTUNITY with the Reverse for Purchase product and the need for you to speak with ALL of YOUR REALTOR PARTNERS about this great product and how it can help them help more senior customers move into their retirement home. Most of you have current realtor referral partners, and most are always looking to build new partnerships. ***The Reverse for Purchase product is THE PRODUCT that can help you DIFFERENTIATE yourself from the competition AND truly bring a new product to them that WILL HELP THEM SELL MORE HOMES!!***

The Reverse for Purchase can help senior buyers either:

- 1) Preserve Cash (Keep some of their cash in their pocket and not need to tie it all up in the home!)*
- 2) Increase Purchasing Power (Buy MORE home than they can with just their cash!)*

We have several marketing tools available to help you talk with your realtors about this exciting program and how it can help them sell more homes, while also educating them on what a reverse mortgage for purchase is AND to dispel the misconceptions of what it is not! Some of these tools include:

- 1) Powerpoint presentation on the Reverse for Purchase*
- 2) EBook on how to work with realtors to market this product*
- 3) Customizable marketing flyers that you can use and distribute to your realtor partners*

The statistics don't lie about how beneficial the Reverse for Purchase program can be and how many potential senior buyers can benefit from this program! According to NAR (National Association of Realtors):

- 39% of all home buyers are Baby Boomers*
- 54% of those buyers use money from the sale of a previous residence as their downpayment*
- 51% of those are ALL CASH buyers*
- 26% of senior buyers are rejected from a conventional loan due to DTI or credit issues*

And, the added benefit to the Reverse for Purchase product this year, FHA now allows for up to 6% Seller/Builder Concessions on Reverse for Purchase loans, making Reverse for Purchase more standardized and in line with conventional purchase loans!

This is a HUGE OPPORTUNITY for YOU to show your realtors how you can help them capture a larger percentage of this growing senior market with the use of a Reverse for Purchase! And if you don't want to believe me about how big this opportunity is, check out the link below to this week's edition of The ResourceTV podcast as they talk about "The Massive Opportunity Nobody is Talking About.....Reverse for Purchase!"

Here is the link to the ResourceTV Podcast (click below):

[The Massive Opportunity Nobody is Talking About....Reverse for Purchase!](#)

If you want to learn more now about implementing any of these strategies to help grow your reverse mortgage business or would like to access the tools referenced above, reach out to me TODAY! Otherwise, stay tuned over the coming days and weeks as we highlight each of these strategies and give you some concrete ways to implement them to help you grow your reverse mortgage business this year!

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Email Sample: SimpleReverse Marketing Campaign - Email 4 - copy

From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : SimpleReverse Marketing Minute (Volume 4): New Networking Partnerships to Build!!

Welcome to the 4th edition of the SimpleReverse Marketing Minute!

*This week we are focusing on **Leg 2(b) of the Reverse Mortgage Marketing Stool - Referral Partners**....And all of the new potential referral partners that you can now build and develop as a result of being able to offer the FHA Reverse Mortgage product from SimpleReverse!*

Last edition, we talked about the opportunities with Realtors using the Reverse for Purchase product. This week, we are going to talk about how a reverse mortgage and tapping into the equity in the home can be used as a funding tool to help seniors better "Age in Place" and all of the new referral partners you can build and develop when looking at the reverse mortgage as a tool to help seniors fund their Aging in Place needs!

With over 12,000 Baby Boomers turning 62 every day, Aging in Place will become a huge opportunity throughout the next several years as most seniors prefer to stay at home rather than go to a nursing home. However, the costs to age at home can be astronomical and unattainable for many seniors. So, here is where the reverse mortgage enters the picture and can be the funding solution for many to age in place by using the equity in their home to fund these costs. *These costs could include home healthcare expenses, home remodeling to make the house more senior friendly, other healthcare costs or many other expenses.*

The great thing about a reverse mortgage is that it can be the product/tool that funds these expenses and can truly be a product that not only helps the senior, but also gives you the ability to market to these other professional groups as offering them a tool that can really help them grow their business' as well. This partnership can be a real "win-win" for all as you look to grow your professional network by offering a tool/product that helps everyone!

Some of these professional groups that you can network and market to include:

-In-home Healthcare Providers

-At home Nursing & Care professionals

-Hospital Networks that provide home care

-Contractors for Aging in Place home modifications (installing ramps, widening doorframes, etc...)

-Walk-in Tub providers

-Stair Lift, Elevator or Wheel Chair Lift providers

- General Home Renovation contractors**
- Senior Transportation Companies**
- And many, many more!!**

This list is just a start! Imagine any business, service provider or network in your local market that provides services to seniors in their home, and they are a potential referral partner for you to educate on reverse mortgages and show them how this tool can help them in their business' and ultimately help more seniors age in place in their homes!!

Here at SimpleReverse, we have a great deal of tools and ideas to help you grow your reverse mortgage business this year! The first step is to develop a strategy to grow your business and then to put it to work.

If you want to learn more now about implementing any of these strategies to help grow your reverse mortgage business, reach out to me TODAY!

And, if you aren't currently even offering reverse mortgages to your customers, call me NOW to learn how we can help you add this great product and new marketing opportunity to your business NOW!!

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Email Sample: SimpleReverse Marketing Campaign - Email 5 - copy

From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : SimpleReverse Marketing Minute (Volume 5): Direct to Consumer Marketing!

Welcome to the 5th edition of the SimpleReverse Marketing Minute!

*This week we are focusing on **Leg 3 of the Reverse Mortgage Marketing Stool - Direct to Consumer Mass Marketing**....And all of the different methods to get directly in front of consumers by marketing directly to the masses in order to show them the benefits of reverse mortgages and how they can help their own situation!*

Last edition, we talked about the opportunities to network with other professionals to market reverse mortgages. This week, we are going to talk about several different strategies to market directly to consumers through various mass marketing opportunities.

The Direct to Consumer Mass Marketing approach is the one leg of the marketing stool that typically does require some upfront costs, however, it is also the method that can yield the quickest return and path to closing reverse mortgage loans. These costs could range from just a few hundred dollars, up to several thousand dollars per month; and could be one-time or ongoing regular expenses. As the old saying goes... *You have to spend money to make money*, this is never more true than with the Direct to Consumer Mass Marketing approach. Below, we will highlight some of the most common and/or most successful methods of Direct to Consumer marketing and attempt to give you some suggestions to help make any of these strategies that you implement as successful and cost effective as possible.

Potential Direct to Consumer Marketing Strategies:

1) Direct Mail -

Keys to direct mail include the list your mailing to, the content of the letter you are sending and a call to action. The best success for direct mail campaigns is to work with a reputable direct mail vendor who can assist with all facets of the campaign. (We do have some recommendations of good vendors to work with if interested)!

2) Television -

Keys here include a good 30-60 spot on a local network or cable channel in your market. Spots should be repeated on a regular basis, a strong call to action and a local celebrity or well known spokesperson can yield more success!

3) Radio -

Most successful radio campaigns involve a regular talkshow or call-in show. Radio can take a long time to build traction and must be done on a channel that has a good following of listeners.

4) **Print Advertising -**

Print ads don't typically yield great results in larger newspapers, but more success can be found in local papers or local magazine type offerings. Best results would be to align ads with the ability to write educational articles that highlight you as a local expert.

5) **Email -**

Email can be a good strategy if you are using some type of CRM to keep in touch with past customers through a newsletter or educational piece. You must be careful about "spam" email and should be used mostly with customers you already have a relationship or partners you already have a relationship with.

6) **Websites -**

This is a MUST. In today's market, you need to have a company website and contained in that website should be a section or information on reverse mortgages, their benefits, FAQs, etc... Many customers will search for companies on the website or at least gather info. A good SEO strategy can help you can visibility on the internet.

7) **Social Media -**

This is fast becoming one of the primary methods of getting in front of senior customers, specifically Facebook, as this is a primary place that seniors use to stay in touch with family and friends. It is suggested that a series of short educational videos, testimonies from past customers or other interactive methods of communicating yield the best results. Additionally, keeping posts informal and personal can help establish you as a "real" person that is willing to help.

This is just a sample of possible direct to consumer mass marketing opportunities, ideas and suggestions that are available. If you want to discuss any of these or other ideas in more detail, please feel free to reach out directly to me to discuss options that might work for you and your budget!

Here at SimpleReverse, we have a great deal of tools and ideas to help you grow your reverse mortgage business this year! The first step is to develop a strategy to grow your business and then to put it to work.

If you want to learn more now about implementing any of these strategies to help grow your reverse mortgage business, reach out to me TODAY!

And, if you aren't currently even offering reverse mortgages to your customers, call me NOW to learn how we can help you add this great product and new marketing opportunity to your business NOW!!

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Email Sample: SimpleReverse Marketing Campaign - Email 6 - copy

From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : SimpleReverse Marketing Minute (Volume 6): Use Stories to Overcome Borrower's Fears About Reverse Mortgages!

Welcome to the 6th edition of the SimpleReverse Marketing Minute!

This week we are going to talk about using stories as a way to overcome borrower's fears and misunderstandings about reverse mortgages!

Shannon Hicks of HECM World, recently wrote an article about how homeowners fear what they don't understand (to access the complete article from Shannon, [Click Here](#)), and this holds a lot of truth in your daily reverse mortgage conversations that you have with potential borrowers.

All salespeople should understand this statement - "*Apprehension is inversely proportionate to understanding,*" meaning that the less a homeowner knows about reverse mortgages, the more likely they will fear the loan; while understanding fosters a sense of calm or even confidence.

Insight Demand CEO Michael Harris says salespeople should be countering emotion with emotion. Instead of quoting facts and figures about reverse mortgages to customers, Harris says, "Telling a story that paints the buyer as a hero, or makes the fear of the status quo seem more frightening than the fear of change." He says these stories must be relatable to the individual and crafted around what you've learned about the homeowner's background, career or interests.

These stories should focus on providing specific insights into the homeowner's objections or fears. For example, if the fear is that the home won't go to the heirs then recount the story of one of your borrower's adult children who successfully acquired the home after their parent's death.

These stories should be:

-Relatable

-Specific

-Concise

-And should weave in specific facts about the reverse mortgage

The one thing every homeowner and individual should fear is, the status quo! It's okay to ask a borrower what is their Plan B if they don't get a reverse mortgage. What would they give up if they were to do nothing?

So, your action step is:

-To come up with a plan. What stories can you tell homeowners to ease their fears? What questions can you ask? How can you speak directly to their heart in an emotional way to help educate them on reverse mortgages, while easing their fears and making them comfortable with this loan program?

Here at SimpleReverse, we have a great deal of tools and ideas to help you grow your knowledge and your reverse mortgage business this year! The first step is to develop a strategy to grow your business and then to put it to work.

If you want to learn more now about reverse mortgages and/or implementing a strategy to help grow your reverse mortgage business with stories of how reverse mortgages have benefitted customers, reach out to me TODAY!

And, if you aren't currently even offering reverse mortgages to your customers, call me NOW to learn how we can help you add this great product and new marketing opportunity to your business NOW!!

[Read our entire Reverse Marketing Educational Series here.](#)

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Email Sample: SimpleReverse Marketing Campaign - Email 7 - copy

From : GMFS Marketing (marketing@gmfslending.com)

To : Fantastic Recipient

Subject : SimpleReverse Marketing Minute (Volume 7): You Have Potential Reverse Mortgage Customers! - Let Us Help You Find Them!!

Welcome to the 7th edition of the SimpleReverse Marketing Minute!

This week we are going to take another look at who is a potential reverse mortgage customer. *Whether or not you know it, you already have potential reverse mortgage customers either in your database currently or that you are talking to today. **Let SimpleReverse help you find them!!***

Reverse Mortgage Customers are Age 62+ who are:

- * *Looking for additional monthly income*
- * *Looking to reduce OR eliminate their monthly mortgage payments*
- * *Unable to qualify for a traditional cash-out refi loan or HELOC*
- * *Looking to reduce or eliminate monthly credit card or other debt*
- * *Looking to purchase a new home OR right-size their home with an alternative to an "all cash" purchase*
- * *Looking to age-in-place and need to do home improvements*
- * *Having cash flow problems*
- * *Looking to create that emergency fund through a line of credit*
- * *Just looking for additional \$\$\$ to better enjoy retirement*
- * *Or, they are the parents or grandparents of your current customers looking for any of the above*

Basically, any senior age 62+ who is looking to access additional money, eliminate debt or purchase a new home through the use of a mortgage or home equity!!

If you want to learn more now about these potential reverse mortgage customers and how to find them, **give me a call TODAY and we can discuss implementing a customized reverse mortgage marketing strategy for YOU!!**

And, if you want to learn more about what reverse mortgages are and how you can best market them to your customer base, call me today to schedule a one on one training session to learn more!

Or, if you aren't currently even offering reverse mortgages to your customers, call me NOW to learn how we can help you add this great product and new marketing opportunity to your business TODAY!!

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