

CONTINUING EDUCATION

HECM Reverse Mortgage as a Risk Mitigation Tool

A complimentary CE course for financial advisors



1 CE Credit



One-Hour Class



Complimentary

Approved CE designations: CFP® · RICP® · CLU® · ChFC®



Course Overview

This session explores the evolving role of reverse mortgages—focusing on the Home Equity Conversion Mortgage (HECM)—as a strategic tool for mitigating key risks in retirement planning.

Participants will gain practical insights into how housing wealth can be integrated into holistic retirement income strategies to help improve financial flexibility, preserve portfolio assets, and address changing needs throughout retirement.

What We'll Explore



HECM Fundamentals

Structure, eligibility, regulatory framework, and key program enhancements.



Strategic Planning Applications

Line-of-credit mechanics, sequence-of-returns risk, tax planning, and portfolio preservation.



Retirement & Care Strategies

Long-term care funding, care transitions, and HECM for Purchase strategies.



Real-World Case Studies

See how HECM strategies can be applied to portfolio withdrawals, tax planning, long-term care, assisted living transitions, and downsizing.

Learning Objective

Equip financial advisors with actionable insights and tools to integrate reverse mortgage strategies into retirement income plans, helping clients achieve greater financial resilience and flexibility.



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