

Jumbo Reverse Mortgages/Jumbo Reverse Purchase Mortgages Retire Smarter

The number one reason “Mass Affluent” would choose to partake in a jumbo reverse mortgage is to fund repairs or modifications on their home, followed by other reasons like the purchase of an investment property, assist in a child’s property purchase or provide them with early inheritance, and to establish college funds for grandchildren.

Fund a more comfortable and secure retirement:

- 1) Refinance an existing mortgage to access a larger pool of funds. (have no monthly mortgage payments and improve cash flow.)
- 2) Credit line: if you draw from a reverse mortgage credit line and allow for a volatile portfolio to recover, there is a far better chance there will be money flowing through a 30-year retirement.
- 3) Cover medical or in-home care expenses.
- 4) All jumbo reverse mortgages loan proceeds are Tax-Free*.
- 5) Maximum principal limit of \$4,000,000. Condominiums eligible.



Purchase Price

\$4 Million

**One Time Buyer
Contribution**

\$2 Million

**Lifetime Monthly
Mortgage Payment**

\$0.00

Preserve your invested assets, hold onto your hard-earned cash. It may help you more comfortably afford an upgrade or spend less money out-of-pocket.



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**“Call Today
No Obligation”**

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Disclaimer: At least one borrower must be age 60/62. Must be primary residence and keep property taxes, all insurance fees current. Purchase - Under most circumstances, borrower can expect to put down about half of the amount of the sale price. Occupancy within 60 days of loan closing. Consult a tax professional*.