

# 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 flexible/optional or 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 retirement.
- 3) Cover medical or in-home care expenses.
- 4) Jumbo reverse mortgage loan proceeds are income tax-free
- 5) Maximum principal limit of \$4,000,000. Condominiums eligible.



**Purchase Price**

**\$4 Million**

**One Time Buyer  
Contribution\***

**\$2 Million**

**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.**



**Reversing PA Mortgage, LLC**  
**Michael J. Friedman, Broker/Owner**  
**215-901-6521 / 561-631-1701**  
**info@reversingmtg.com**  
**www.reversingmtg.com**  
**Available Day, Evenings & Weekends**  
**NMLS# 1396947 NMLS# 131880**

**“Call Today  
No Obligation”**

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Disclaimer: At least one borrower must be age 55. Purchase- occupancy within 60 days of loan closing. \*Under most circumstances, the borrower can expect to put down about half of the amount of the sale price. \*\*The borrower must meet all loan obligations including living in the property as the principal residence and paying property charges, including property taxes, fees, hazard insurance. The borrower must maintain the home, if the homeowner does not meet the loan obligations, then the loan will need to be repaid. Licensed in PA. #53672 and FL. # MBR2252.