

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
			<b>Intro to RM</b> 31 11:00 – 11:30 am (PT) <a href="#">click to register</a>  <b>Quantum</b> 1:00 – 2:00 pm (PT) <a href="#">click to register</a>	<b>H4P</b> 1 11:30 – 12:00 pm (PT) <a href="#">click to register</a>	<b>Reverse Vision Demo</b> 2 12:30 – 1:30-pm (PT) <a href="#">click to register</a>	3
4	5	<b>Quantum Demo</b> 6 11:00 – 12:00 am (PT) <a href="#">click to register</a>	<b>Financial Assessment</b> 7 10:00 – 10:30 am (PT) <a href="#">click to register</a>  <b>Appraisals</b> 1:00 – 1:30 pm (PT) <a href="#">click to register</a>	<b>HECM to HECM Refi</b> 8 12:00 – 12:30 pm (PT) <a href="#">click to register</a>	9	10
11	<b>LESA</b> 12 11:00 – 11:30 am (PT) <a href="#">click to register</a>	<b>Reading a Rate Sheet</b> 13 10:00 – 10:15 am (PT) <a href="#">click to register</a>	14	15	16	17
18	19	<b>Adjustable v Fixed</b> 20 11:00 – 11:30 am (PT) <a href="#">click to register</a>	<b>Servicing</b> 21 11:00 – 11:30 am (PT) <a href="#">click to register</a>	<b>H4P</b> 22 1:00 – 1:30 pm (PT) <a href="#">click to register</a>	23	24
25	26	<b>Trusts and POAs</b> 27 11:00 – 11:30 am (PT) <a href="#">click to register</a>	<b>Quantum Demo</b> 28 11:00 am – 12:00 pm (PT) <a href="#">click to register</a>	<b>Reverse Vision Demo</b> 29 11:00 am – 12:00 pm (PT) <a href="#">click to register</a>	30	

## **COURSE DESCRIPTIONS:**

*Please Note:*

All courses are delivered using Zoom and scheduled in Pacific Time zone.

Once you have registered, the invitation will reflect your current time zone in Outlook.

### **Adjustable vs. Fixed Rate**

This session will discuss the differences between the Adjustable and Fixed Rate products while providing the attendee with guidance on how to determine which is best for the customer.

### **HECM for Purchase**

Another great product that you can add to your repertoire. Learn how borrowers can purchase a new primary residence with a Reverse Mortgage! Example scenarios will be featured.

### **Intro to Reverse Mortgage**

This short fifteen-minute training session will provide the attendee with a high-level overview of the HECM and debunk common myths about the product.

### **RV DEMO**

This demo will show the learner the dashboard of Reverse Vision, how to create a Proposal, how to create and email an Application and how to submit.

### **Trusts and POAs**

Find out what the specific requirements are when using a home for a HECM that is in a Trust.

### **Appraisals**

All appraisals are not the same. Join us as we look at the different types of Appraisals that are involved with a Reverse Mortgage.

Learn what to look for in a good Appraisal and when to ask for a revised one.

### **HECM to HECM Refi**

HUD requires all potential customers interested in a HECM to HECM Refi undergo a specific worksheet calculation to ensure this product will be beneficial to them. In this training we will walk through using the worksheet and determining how to address specific regarding MIP and revisions of their current Reverse Mortgage.

### **LESA**

This course provides you with the opportunity to grow your pipeline by discovering the various ways HUD assists Borrowers who have low income and/or blemished credit.

This is a comprehensive course on both the Partially Funded and Fully Funded LESAs including when and why they are used

### **Servicing**

Learn what happens post-close. Attendees will gain knowledge of the servicing process of the loan. Information shared during this session can be passed on to the Borrower which can further enhance their Reverse Mortgage experience.

### **Financial Assessment**

Knowing the importance of the Financial Assessment and how it is used to determine the implementation of the LESA will help you gain knowledge on how to best serve your customer and steer them towards the proper product for their specific needs.

### **How to Read a Rate Sheet**

This highly beneficial course explains the details regarding our Rate Sheet and how to use it to calculate broker YSP. Examples will be included.

### **Quantum Reverse Demo**

A one-hour training that showcases the ability of Quantum Reverse to create both Proposals and Applications. I will walk you through the system from start (the Dashboard) to finish (Submission).

### **Submissions**

Submitting a clean loan application greatly benefits the borrow by ensuring a timely approval.