

REVERSE MORTGAGE GUIDE OVERVIEW

This Reverse Mortgage Guide has been created for your education and the education of your clients. This guide has been designed for digital distribution and includes interactive features. If you need the print version, [click here](#). Please read this document to learn about the interactive features and how to brand it for your use.

INTERACTIVE FEATURES

- 1) The **Table of Contents** is clickable and will take your client to the specified place in the document.
- 2) To return to the Table of Contents, the user can click on the **hexagon icon** on any given page. **Examples:**



- 3) The **Test Your Knowledge** sections have a button at the bottom that will take the user to the answer key page. **Example:**

Questions

Test Your Knowledge

TRUE OR FALSE?

*HOVER OVER THE QUESTION
TO REVEAL THE ANSWER*

A reverse mortgage requires a monthly mortgage payment to the lender, just like a traditional mortgage.

Answers (click button)

*CLICK HERE TO GO
TO THE ANSWER KEY*

The **answer key page** links back to the page number listed. To get back to the page, the user can **click on the page number**:

KNOWLEDGE TEST ANSWER KEY

TIP
Click on the page number header to return to that page.

PAGE 3
TRUE OR FALSE?

Statement
A reverse mortgage requires a

PAGE 9
CHOOSE THE FALSE STATEMENT

Statement
A reverse mortgage can turn home equity into cash.

Answer: This is true

BRANDING THE GUIDE

1) DOWNLOAD THE GUIDE & SAVE IT LOCALLY

The first thing you should do is download a copy of the guide and save it locally. Depending on the browser you are in, there will be a download option or a save option.

2) ADDING YOUR BRANDING TO IT

Open the guide in your PDF app, like Adobe Acrobat.

LOGO

On the cover, you can click on the **Click to Add Your Logo** to upload your company logo. This will add your logo to the cover page, and to the back page.



YOUR CONTACT INFO OR COMPANY WEBSITE

Throughout the document, there are places for your company website to go, or for you to add a phone number, email address, name, etc. If you add it to the fillable field on page 3, it will automatically add the same thing to every other location in the document (pages 7, 13, 15, and 21). **Example:**



YOUR COMPLETE CONTACT INFORMATION AND DISCLOSURE

On the last page of the guide, you can add your contact details and required disclosure. Again, the logo will be auto populated when you upload it to the cover page.

Please be sure to check with your legal & compliance team for necessary disclosure for your specific industry and use.

First and Last Name	Click to Add Your Logo
NMLS #	
Email Address	
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Include your company address here and any necessary disclaimer and licensing information. Please consult your legal and compliance team for your specific industry requirements.

Once you have branded the document for your use, you can save and distribute as needed.