

REVERSE MORTGAGE DAY

WEDNESDAY, SEPT 6

5:00 – 7:00 pm Cocktail Reception Victorian Room
Sponsors: Liberty Home Equity Solutions, Inc., LRES Corp; Reliable Tax Data; ReverseAmerica Advisors Incorporated; and Texas Capital Bank.

THURSDAY, SEPT 7

7:30 am Registration Mezzanine

7:30–9:00 am Continental Breakfast Mezzanine

9:00–9:15 am Welcome and Introductions Driskill Ballroom
Scott Norman, Finance of America Reverse

9:15–9:45 am The View From Washington, DC & NRMLA Driskill Ballroom
Steve Irwin, NRMLA

9:45–10:15 am Research Insights: Home Equity Borrowing, Driskill Ballroom
Reverse Mortgages and Senior Financial Outcomes
Stephanie Moulton, The Ohio State University

10:15–10:30 am Break Mezzanine

10:30–11:15 am Where Retirement in America is Heading Driskill Ballroom
T. Britton Harris III, University of Texas Investment Management Co.

11:15–12:15 pm The Final Rule Driskill Ballroom
Leslie Flynn, RMS and Elly Johnson, United Northern Mortgage Bankers

12:30–1:45 pm Lunch & Keynote: Mezzanine
Why Leadership Matters?
Daron K. Roberts, University of Texas

2:00–2:45 pm ML 2017-12: First Thoughts Driskill Ballroom
Mike Kent, Liberty Home Equity & Mike McCully, New View Advisors

2:45–3:45 pm What's in it for me? Driskill Ballroom
The Regulatory Hurdles and Pitfalls for Reverse Mortgage Originators
in Working with Financial Planners and Other Professionals
Jim Milano, Weiner Brodsky Kider PC