

Reverse Mortgage Referral Partner Checklist

For Real Estate Agents, Advisors & Trusted Professionals



By Rick R. Rodriguez, Certified Reverse Mortgage Professional (CRMP®)

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📍 Based in Las Vegas, NV — Helping clients nationwide

Who Is This For?

This checklist is designed to help real estate professionals, financial advisors, attorneys, and CPAs identify whether partnering with a reverse mortgage expert could benefit their clients — and their business.

Ideal Referral Partner Profile

You might be a great fit if:

- You work with clients age 55 and older
- Your clients have significant home equity or own their home free and clear
- You want to offer clients creative solutions for retirement cash flow, downsizing, or aging in place
- You're looking for a trusted reverse mortgage partner to simplify the process for your clients

Benefits of Partnering with Rick

- Access to a CRMP® — the highest credential in the reverse mortgage industry
- Personal service from an originator with 20+ years of reverse mortgage experience
- Accredited instructor with the Nevada Real Estate Division
- Approved educator with the CFP® Board
- A commitment to educating, not selling — always with your client's best interest first

📌 Let's Talk If You:

- Have older clients exploring retirement funding options
- Want to help a client buy their next home with no monthly mortgage payment
- Are a fiduciary or advisor interested in tax-efficient income strategies
- Simply want to learn more and see if this fits your business model

★ About Rick R. Rodriguez, CRMP® NMLS# 473353

Rick Rodriguez is a nationally recognized Certified Reverse Mortgage Professional and the first CRMP® in Southern Nevada. With over 20 years in the mortgage industry and a focus on reverse since 2005, he's guided thousands of families through understanding the implications of a reverse mortgage. He's currently licensed in: NV, AZ, CA, CO, FL, OK, TX, WA and WY.

Ready to discuss a potential referral? Contact me directly

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