

THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

MARCH MEETING

Date: Tuesday, March 9, 2021

Time: 11:30 a.m. - 1:00 p.m.

Place: This will be a Virtual Session. Sign-on Particulars will be sent to Attendees closer to the session date.

Speakers: Bonny Gilbert

Topic: Understanding Reverse Mortgages and Their Applications in Planning

ABOUT THE SPEAKER

Bonny Gilbert

Bonny Gilbert, a Lender at Fairway Mortgage Company, will provide an overview of the features and many applications for a reverse mortgage, including their potential positive impact on clients' cash flow, use in long-term care planning, and as general investment protection. She'll also dispel the negative perceptions of these very useful financial instruments by highlighting the changes in the regulation of the industry and the underlying mechanisms that enable them. Bonny's expertise in the mortgage industry, along with her financial background and 10 years as a practicing attorney, puts her in a unique position to help advisors and their clients understand all of the decisions involved in using these flexible tools to purchase a new home or refinancing existing mortgages.

Bonny Gilbert joined the mortgage industry in 2010 after years working in finance and later practicing law. When she joined the mortgage industry, she was drawn to reverse mortgages because she immediately recognized the important role reverses could play in increasing retirement security. Bonny's background enables her to make the reverse mortgage process understandable for clients, as well as to educate financial advisors and other professionals about the wide application of the reverse mortgage for financial and estate planning. Bonny earned her undergraduate degree from Boston University and her juris doctorate from Suffolk University (magna cum laude). Bonny lives with husband in Brookline, MA., along with the youngest of her three children, and their dog.

Bonny Gilbert's article was just featured in a new online publication for financial advisors, Rethinking65.com, about reverse mortgage applications for affluent clients.

Regular Meeting Dates for the 2020-2021 Fiscal Year:

Meetings will be held the second Tuesday of September, November, January, February, March and May.

Cost for this meeting: FREE

(Let us know if you are attending. We need to be sure we have adequate connections). YOUR COMMITMENT MUST BE RECEIVED BY FRIDAY, March 5 at 10 a.m., WITHOUT EXCEPTION.

Name _____

Company/Firm _____

Yes, I will attend on **March 9.** ____ No, I can't attend. ____

Visit our Web Site: <http://www.estateplan-hc.org>

Membership Application or Change of Address: <http://www.estateplan-hc.org/application.htm>

NAEPC Web site: <http://www.naepc.org>