smpl mortgage
GENERATIONAL LENDING



FINANCIAL PLANNER SERVICES

Liability Management solves financial planning challenges form the Liability side of the Balance Sheet

LIABILITIES TO ASSETS

- *ACCUMULATION*
- *DISTRIBUTION*
- *PROTECTION*
- *ESTATE/LEGACY*
- *CASH FLOW*
- *DEBT*

BORROW SMART LIABILITY REVIEW

- *Cash flow optimization*
- *Reduce interest costs over time*
- *Leverage to build assets*
- *Purchase/Refinance/Renovation*
- *Investment/Second/Vacation homes*

PRE-RETIREMENT MORTGAGE PLANNING

- *Planned Trade Down*
- *Right Sizing*
- *Reverse Mortage Analysis*
- *Retirement Income Planning*
- *Cash Flow Optimization*
- *Trustee Financing/Beneficiary Equalization*

DIVORCE MORTGAGE PLANNING

- *Pre-Divorce real estate/mortgage planning*
- *Equity division and cash flow review*
- *Pre-Approval for equity buyout options*
- *Coordination with the Divorce Team*
- *Real property/Mortgage Divorce report*

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