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Financial Advisors: Why You Need a CMPS!

If you are not yet involved in giving your clients mortgage and real estate equity advice, someone else will take your place.

Don't miss out on this tremendous opportunity to retain your clients' trust and loyalty while adding significant value to your advisory relationships.

- CMPS Members have demonstrated financial knowledge and expertise regarding the tax and financial planning implications of various mortgage and real estate investment strategies. Therefore, CMPS professionals are an essential and highly effective member of your team in helping your clients:
 - ◆ Increase liquidity
 - ◆ Better manage their cash flow
 - ◆ Become debt free sooner
 - ◆ Achieve true financial freedom
- CMPS Members recognize your value as the quarterback of your clients' advisory relationships and are committed to adding value to your client relationships and the holistic financial planning process
- 40% of all U.S. residential property sales are vacation homes and investment properties
 - ◆ CMPS professionals are qualified to help you advise your clients in this area
- "Exotic Mortgages" represent 25%–50% market share in today's market
 - ◆ CMPS professionals are equipped to help you and your clients safely navigate today's mortgage environment
- 25% of Americans in their peak earning years (ages 50–65) saved absolutely nothing for retirement last year
 - ◆ CMPS professionals are trained to implement mortgage, cash flow and home equity management strategies to help your clients better prepare for retirement
- CMPS professionals are equipped to guide you and your clients in implementing the best home equity and mortgage strategies for divorce situations
- CMPS professionals can help your clients implement cash flow and financial strategies to finance their children's education
- CMPS professionals are equipped to better enable your clients to financially care for your elderly parents
- CMPS professionals are able to help your clients implement beneficial mortgage and real estate equity strategies before and during job or career changes
- CMPS professionals can help empower your clients to start or sell their business by implementing viable mortgage and real estate equity strategies
- CMPS professionals are able to recommend the proper financial strategies when your clients are ready to buy or build a vacation home
- CMPS professionals are able to help your clients generate tax free income during retirement and add value to various investment "withdrawal" scenarios
- CMPS professionals are equipped to protect your clients from mortgage and real estate investment scams

- CMPS professionals are qualified to help you and your clients implement mortgage and real estate equity strategies that save money on income, capital gains and estate taxes
- CMPS professionals are committed to helping your clients improve their credit score and get the best deal on their financing
- CMPS professionals can help your clients increase the safety & rate of return of their real estate assets
- CMPS professionals can help you build a niche with real estate investors by helping them increase their liquidity, tax advantages, profitability and yield on investments
- CMPS professionals have pledged to follow a Code of Ethics

You and/or your mortgage planning partner are probably already experts in providing holistic and comprehensive financial planning services, but take this short quiz just to be sure:

- What is the current unemployment rate in your local market and what impact does it have on the so called "Housing Bubble"?
- What are mortgage rates based on? (Answer is not the Fed or the 10 yr Treasury Note)
- Where are mortgage rates headed in the days and months to come and what are the trends and economic reports that will drive them up or down?
- How do you help clients evaluate various real estate settlement options during a divorce?
- How can your clients save money on income, estate and capital gains taxes when buying and selling real estate?
- What are the specific financial strategies for caring for elderly parents / senior citizen mortgage strategies?
- What are the specific financial strategies for clients who are changing jobs or careers?
- How do you help clients determine how they can most effectively finance a vacation home?
- What are the top 5 tax benefits of investing in real estate and the mortgage planning techniques that make these strategies even more profitable for real estate investors?
- Are you or your lending partner aware of the top 3 mortgage planning strategies that work well with 1031 Exchanges?
- How do you help clients calculate, compare and increase their rate of return on real estate investments?
- If you were given the opportunity to consult with or speak in front of high net worth real estate investors, do you have the knowledge, skills and presentation tools to impress your audience and turn them into profitable clients?

For more information on how the Jay Robins Team can be of more value to you and your clients, call us at 561-852-6111 or email Jay directly at jay@jayrobins.com

