**Who is this email for?**

Clients in your database age 55+, who currently have a reverse mortgage coming up for reset with a lender other than Equitable Bank

**Instructions to send the email:**

1. Copy and paste the text below into your email system
2. Replace any red font with the correct information
3. Add the email subject line
4. Press ‘Send’

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**Email subject line:** Let’s switch up your reverse mortgage and save!

Hi [Name],

I’m reaching out to you with a great opportunity to save money on your current reverse mortgage.

**Switch your reverse mortgage to Equitable Bank and save**. With Equitable Bank’s Reverse Mortgage Switch Up you could switch your existing reverse mortgage coming up for reset, helping you to save money and access the benefits of Equitable’s reverse mortgage solutions.

**Switch Up Program Features**

1. **1% Cashback Incentive**: 1% cashback on the total advance (up to $4,000) to help offset the costs to switch your reverse mortgage to Equitable Bank
2. **Waived $995 Setup Fee:** Reducing the upfront costs
3. **Great rates:** We’ll beat any posted rates for comparable reverse mortgage products\*, ensuring you benefit from lower interest costs over the life of the loan

**Benefits for you**

* **Significant Savings**: Save significantly on interest costs, making the switch financially beneficial in the long run
* **Flexible Prepayment Options:** We know life changes and financial needs evolve. We offer accommodating prepayment options
* **Access to the myEquitable Portal:** An easy-to-use online platform for you to manage all things regarding your reverse mortgage

Connect with me today to learn how to take advantage of this competitive offer and save!

<Your signature>

\*Equitable Bank regularly monitors the posted rates of its reverse mortgage competitors. If the rate posted on a competitor’s website for a comparable reverse mortgage product in Canada is lower than ours on the date of your application, we will offer you a better rate. All applications are subject to Equitable Bank’s standard lending guidelines, practices and approval criteria. If you submit your application on a non-business day, we will compare rates as posted on the following business day. New originations only. Promotions excluded.

Minimum loan size of $150,000 or greater to be eligible. In the event the reverse mortgage is paid out before the completion of 5 years with Equitable Bank, the client will be required to repay a percentage of the cashback amount received.

This email was sent by [Name of the Person/Organization sending the email] on behalf of Equitable Bank.

Equitable Bank  
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[CONTACT US](https://www.equitablebank.ca/contact-us)

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