## NCOA - National Council on Aging

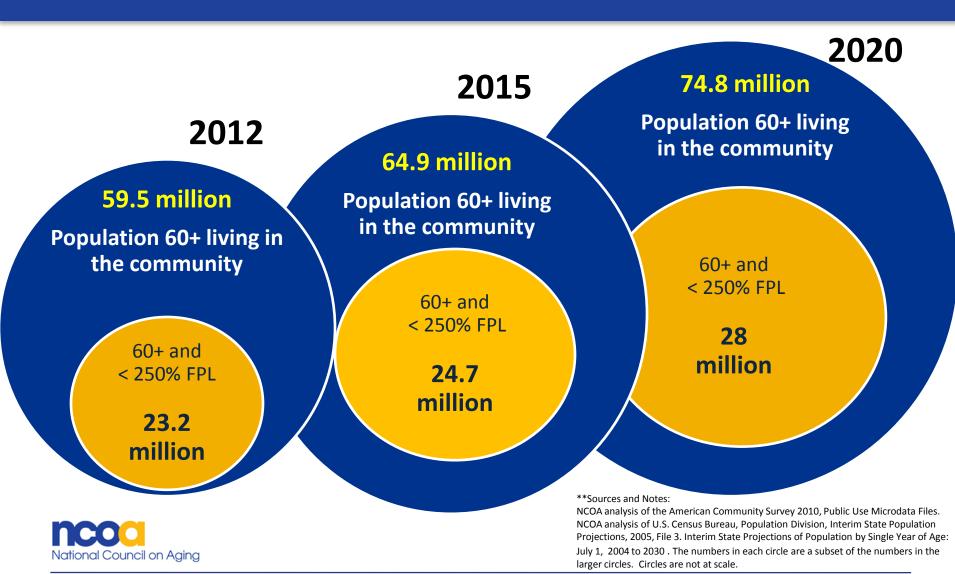
NCOA is a nonprofit service and advocacy organization.

Our mission is to improve the lives of millions of older adults, especially those who are vulnerable and disadvantaged.





### Demographics



# NCOA's Social Impact Goals for 2020 & Economic Security Initiative

- Improve the economic wellbeing of 5 million low-income, vulnerable older adults by providing comprehensive, integrated services that significantly increase their income and/or reduce their expenses.
- Using integrated economic assistance in 20 communities, the Economic Security
   Initiative has helped 6,000 seniors improve their economic well-being by \$3,000 annually. For an older woman living on the average Social Security Benefit that's a 25% increase.





## Benefits CheckUp® benefitscheckup.org

#### As of today:

BenefitsCheckUp® has helped over 3.5 million older adults find over \$13 billion worth of annual benefits.





## Home Equity

- Home Equity Conversion Mortgages (HECM loans) can be a lifeline for seniors of modest means, but they're not for everyone
- Counseling is critical and required
- Aspects of HECM counseling:
  - Pros/Cons
  - Real numbers for comparisons
  - Alternatives Discussion
  - Costs and Fees
  - Financial Interview Tool
  - Benefits CheckUp<sup>®</sup>
- HomeEquityAdvisor.org





#### Find Out More

#### How You Can Get Involved

- NCOA.org
- BenefitsCheckUp.org
- RestartLiving.org
- MyMedicareMatters.org
- HomeEquityAdvisor.org
- EconomicCheckUp.org

Amy Ford: <a href="mailto:amy.ford@ncoa.org">amy.ford@ncoa.org</a>
Director, RMCS Network



