

The Certified Home Equity Advisor (CHEA) Credential



8-Hour CE Program for Financial and Insurance Professionals

Exclusively for Members of the National Association of Insurance and Financial Advisors (NAIFA)

Gain the Expertise to Strengthen Retirement Strategies by Integrating Housing Wealth

The CHEA designation represents advanced expertise in leveraging home equity as part of a holistic retirement plan. It reflects a deep understanding of the financial challenges older adults face and equips advisors to integrate housing wealth—when appropriate—into personalized strategies that help protect assets, improve cash flow, and support long-term independence.

Why Earn Your CHEA Credential?

- Stand out with specialized expertise in reverse mortgage strategies
- Be the go-to advisor for clients navigating retirement and home equity
- Strengthen retirement plans with tax-smart, longevity-focused, coordinated drawdown strategies
- Join a purpose-driven network built on ethics and fiduciary excellence
- Gain access to explainer videos, marketing assets, and scenario support

What's Included

- 8-hour CE course (4 × 2-hour virtual sessions)
- Training by Fairway Home Mortgage licensed reverse mortgage specialists
- Certificate + digital credential
- Ongoing access to Fairway's mortgage tools and advisor scenario desk
- Optional in-person sessions in select areas

Who Should Enroll?

- Financial advisors, CFP®s, RIAs, and insurance professionals
- Anyone helping clients 55+ with retirement cash-flow planning

Course Fee \$200 / Annual Renewal \$50

(NAIFA Membership Required)

Not A NAIFA Member Yet?

Join now at: belong.naifa.org/join

Membership unlocks CHEA access and premier industry education and advocacy.

COMING SOON:

Registration and course launch details will be announced shortly. *Stay tuned!*

QUESTIONS?

Email: CHEA@fairwaymc.com

NAIFA + FAIRWAY = A SMARTER WAY TO SERVE SENIOR HOMEOWNERS.

Prepare now. Advise with confidence. Make an impact.

