



Welcome Kit

John Doe – MAMP-327

APlus Group of Companies, locally owned, has been creating and delivering comprehensive yet affordable products and services for Newfoundlanders and Labradorians for over 30+ years. APlus Group also offers in-house Investments\ Life Insurance\ RESP\ Income Tax departments. This creates several advantages for our clients: **One Stop Shopping!**

Please find enclosed the following:

- 1) Application for Discount Card
- 2) Discount Card
- 3) Income Tax Voucher
- 4) Kid Konnection Enrollment form
- 5) APlus Group Additional Services Brochure
- 6) Information on APlus Group of Companies Events
- 7) Will Planning Workbook
- 8) APlus Appointment Request Form

10 Austin St. Suite 105 St. John's, NL A1B 4C2

Tel: (709) 754-2208 | Toll Free: (877) 954-6507 | Fax: (709) 754-2160

admin@aplusmortgage.ca

www.aplusmortgage.ca | www.aplusinsurance.nf.ca | www.aplusaccountingservices.ca



WHY APLUS MORTGAGE?

More Than Just A Rate!

- 1. Competitive Rates**
- 2. No Fees For Our Services**
- 3. Client Loyalty Discount Card**
- 4. Income Tax Discount Voucher**
- 5. Kid Konnection Program**
- 6. Annual Family Fun Day**

FIND US ONLINE TODAY

www.aplasmortgage.ca





Application for APlus Discount Card*

CLIENT INFORMATION

Name: (First, Last)		
Address:		
Cell Ph:	Work Ph:	Home Ph:
Email		
Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female		Marital Status: Children: _____
Contact Preference: <input type="checkbox"/> E-Mail <input type="checkbox"/> Text <input type="checkbox"/> Telephone <input type="checkbox"/> Mail <input type="checkbox"/> Other		

PARTNER INFORMATION

Name: (First, Last)		
Address:		
Cell Ph:	Work Ph:	Home Ph:
Email		
Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female		Marital Status: Children: _____

DEPENDANT INFORMATION

Name	Date of Birth
Name	Date of Birth
Name	Date of Birth
Name	Date of Birth
Name	Date of Birth

AUTHORIZATION

***Disclaimer: This information will not be reproduced or distributed in whole or part without prior written consent. The personal information you provided in this profile will be utilized by APlus to inform you of services, products, programs, rate changes, Newsletter, promotions, etc. that we believe may be of interest to you.**

Client Signature

Date

Partner Signature

Date



September 1, 2019

John Doe
10 Austin Street
St. John's, NL
A1B 4C2

Dear John,

APlus Group of Companies developed “**Preferred Partnership Program**” to reward loyal clients and help our local Business partners. This Program offers a “**point of sale discount**” **from 10 to 20%**, at local participating Businesses displaying our APlus Window Decal. Also, it allows the employee to participate in APlus Mortgage Loan Program and APlus Real Estate Incentive Program.

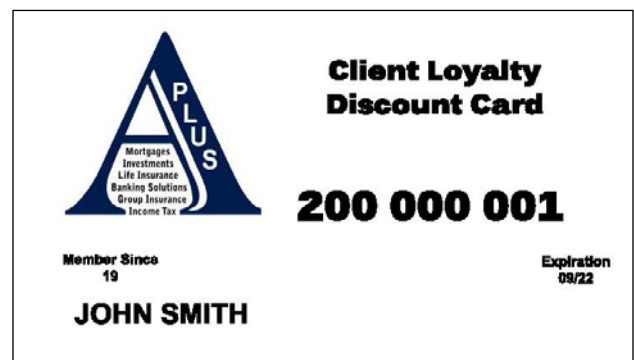
Please find enclosed your “**Client Loyalty Discount Card**” offered exclusively by APlus Group of Companies. For a complete list of Partners please visit www.aplusmortgage.ca.

Sherry O’Brien will be your primary point of contact at APlus Group of Companies, and I encourage you to contact her at any time with your questions, comments, and feedback. Call (709) 754-6507 ext. 0 or e-mail: sherry@aplusinsurance.nf.ca.

Sincerely,

Lawrence R George

Lawrence R George
President & CEO
APlus Group of Companies





INCOME TAX VOUCHER

Client: John Doe

Client #: MAMP-327

This voucher is redeemable at APlus Accounting Services Inc.¹ for a **25% discount**² towards your Personal Income Tax Preparation³ for term of your mortgage with APlus Mortgage Group Inc. Annual Mortgage statement required. Voucher has no cash value.

Lawrence R George

Lawrence R George
President & CEO
APlus Group of Companies

¹ Income Tax Fees – www.aplusaccountingservices.ca

² **Discount up to 100%** depending on the number of services with APlus

³ Client, partner & dependants

Discount Excludes HST& E-filing fee



Kid Konnection Program

CLIENT INFORMATION

Client Name:	
Address:	
Phone (H)	Phone (M)
Email	
RESP: Currently Enrolled <input type="checkbox"/> Yes <input type="checkbox"/> No	Carrier:

CHILDREN ENROLLMENT

Name:	
Date of Birth:	Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female
Name:	
Date of Birth:	Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female
Name:	
Date of Birth:	Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female
Name:	
Date of Birth:	Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female
Name:	
Date of Birth:	Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female

PRIVACY AGREEMENT

APlus Group has my permission to use my or my child's (Listed in Registration) photograph publically to promote the Kid Konnection Program and other events offered by APlus. I understand that the images may be used for lawful purposes only in print publications, online publications, presentations, websites, and social media. I also understand that no royalty, fee or other compensation shall become payable to me by reason of such use.

Parent Signature

Date

APlus Group Offers Many Solutions for Your Financial Needs.

Individual Life and Health Insurance, Investments, Mortgages, Retirement Products and Financial Services to help you build wealth and protect your financial security by providing solutions to help you save for today, provide income for tomorrow, and future protection for your family.

APLUS GROUP ADDITIONAL SERVICES

Financial	Investments & Banking
<input type="checkbox"/> Mortgages	<input type="checkbox"/> RRSP <input type="checkbox"/> TFSA
<input type="checkbox"/> Income Tax Services	<input type="checkbox"/> GIC
<input type="checkbox"/> Financial Estate Planning	<input type="checkbox"/> RESP
Insurance	<input type="checkbox"/> Manulife Bank
<input type="checkbox"/> Mortgage	Events
<input type="checkbox"/> Individual Life	<input type="checkbox"/> Annual Family Fun Day
<input type="checkbox"/> Critical Illness	<input type="checkbox"/> Home Buyers / Financial Planning Seminars
<input type="checkbox"/> Blue Cross	<input type="checkbox"/> Annual Financial/Mortgage Review
<input type="checkbox"/> Disability Income	<input type="checkbox"/> Preferred Partnership Program
<input type="checkbox"/> Travel Insurance	<input type="checkbox"/> Client Newsletter

TOP THREE FINANCIAL GOALS

<input type="checkbox"/> Purchase Home <input type="checkbox"/> Selling Home <input type="checkbox"/> 0-3m <input type="checkbox"/> 3-12m <input type="checkbox"/> 1-3Yrs <input type="checkbox"/> Debt Free <input type="checkbox"/> Make and utilize a budget <input type="checkbox"/> Maximize Tax planning through RRSP <input type="checkbox"/> Strategies for reducing income taxes <input type="checkbox"/> Maximize TFSA <input type="checkbox"/> RESP <input type="checkbox"/> Estate Planning <input type="checkbox"/> Emergency Fund	<input type="checkbox"/> Saving for retirement <input type="checkbox"/> Plan for early retirement <input type="checkbox"/> Income withdrawal strategies for/in retirement <input type="checkbox"/> Maintaining my standard of living in retirement <input type="checkbox"/> Establish a plan to leave your finances in order upon your death <input type="checkbox"/> Income replacement in the event of death, sickness, or accident <input type="checkbox"/> Creating/preserving an estate for my heirs <input type="checkbox"/> Leaving a legacy or inheritance <input type="checkbox"/> Other
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APlus Group of Companies Events

Over the past 5 years APlus Group of Companies has hosted APlus Annual Family Fun Day to honor our clients and to support the Canadian Cancer Societies local Daffodil Place. We have a silent auction, BBQ, kids' games, prizes, 50/50 Draw and entertainment for the whole family. 100% Proceeds go directly to the Daffodil Place.



5TH ANNUAL Family Fun Day

100% Proceeds Go to the Daffodil Place



YOU ARE INVITED
Enjoy a Fun Filled
Day with the APlus
Team

 <p>Participate in Our Charity SILENT AUCTION <small>(BID NOW, PAY LATER)</small> and help support the DAFFODIL PLACE</p>	    
 <p>KARLEE WIGHT PHOTOGRAPHY</p>	  <p>CHASE Newfoundland Dogs</p>
 <p>Join the Staff from Get Air for Fun Games & Prizes</p>	  <p>50/50 FUNDRAISER DRAW</p>

BBQ
Hot Dog - \$1.00
Burger - \$2.00
Drinks - \$1.00
Juice Pks - 50 ¢
Chips - 50 ¢
**CLIENTS OF APLUS
EAT FREE**

**50/50
FUNDRAISER
DRAW**

**Games
& Prizes**

RAIN OR SHINE

JULY 13, 2019
1-3 P.M.
PIPPY PARK
NORTH BANK LODGE
FREE ADMISSION

FOR MORE INFORMATION
709.754.2208
sherry@aplusmortgage.ca
www.aplusmortgage.ca
Facebook | Twitter



* A REGISTERED FRANCHISE OF MORTGAGE ALLIANCE*

Other Events

- Client Appreciation Night
- Family Events
- Kid Konnection Contests
- Quarterly Contests on Social media
- Seminars

Tax, Retirement
& Estate Planning Services

Your Will Planning Workbook





APPOINTMENT REQUEST FORM

Client Name:

<input type="checkbox"/> Include Spouse /partner	Name:
Address:	
Phone (H):	Phone (C):
Email:	

TIME

What day work best for you?

Monday Tuesday Wednesday Thursday Friday

What time of day works best for you?

Morning Afternoon Evening

Date and time?

Month Day Time am/pm

WHAT SERVICES ARE YOU INTERESTED IN?

<input type="checkbox"/> Mortgages \ Refinancing \ Switching	<input type="checkbox"/> Life Insurance
<input type="checkbox"/> Debt Consolidation	<input type="checkbox"/> Critical Illness Insurance
<input type="checkbox"/> Retirement Planning	<input type="checkbox"/> Disability Income Insurance
<input type="checkbox"/> Estate Planning	<input type="checkbox"/> Blue Cross \ Health Insurance
<input type="checkbox"/> Investment Loans	<input type="checkbox"/> RRSP <input type="checkbox"/> TFSA <input type="checkbox"/> GIC <input type="checkbox"/> RRIF <input type="checkbox"/> LIF
<input type="checkbox"/> RRSP Loans	<input type="checkbox"/> RESP
<input type="checkbox"/> Personal Income Tax	<input type="checkbox"/> Long Term Care
<input type="checkbox"/> Other	<input type="checkbox"/> Travel Insurance

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Advantage of APlus Mortgage VS Banks, Credit Unions & other Brokerage Firms

List of Suppliers from the APlus Preferred Partnership Program that can save you money

1. Home Inspector
2. Appraiser
3. Lawyers
4. Moving Company
5. Furniture Company
6. Security Company
7. Personal Income Tax Discount

Find a complete list of APlus Preferred Partner's visit
www.aplusmortgage.ca



**APlus Mortgage Group Inc.
APlus Insurance/Financial Group Inc.
APlus Accounting Services Inc.
APlus Preferred Partnership Program
APlus Kid Konnection**

Serving your financial needs for more than 30 years!

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