



Welcome Kit

John Doe – APLUSAS-12345

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 Mortgage\Life Insurance\ Investments\RESP\ Income Tax departments. This creates several advantages for our clients: **One Stop Shopping!**

Please find enclosed the following:

- 1) Income Tax Client Profile
- 2) Application for Discount Card
- 3) Discount Card
- 4) APlus Mortgage Gift Card (\$500.00)
- 5) Advantages of APlus Mortgage
- 6) Kid Konnection RESP Enrollment form
- 7) APlus Group Additional Services Brochure
- 8) Information on APlus Group of Companies Events
- 9) Will Planning Workbook
- 10) 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.aplusinsurance.nf.ca | www.aplusmortgage.ca | www.aplusaccountingservices.ca



CLIENT INFORMATION

<input type="checkbox"/> Id: (2)	<input type="checkbox"/> Driver's License	<input type="checkbox"/> Passport	<input type="checkbox"/> Birth Certificate	<input type="checkbox"/> Other
Id #: _____ Exp: / /		<input type="checkbox"/> New Client <input type="checkbox"/> Current Client		
Name: _____				
Address: _____				
Cell Ph: _____		Work Ph: _____		Home Ph: _____
Email (P) _____			Date of Birth: _____	
SIN: _____		Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female		Marital Status: Married / Common Law / Divorced /separated / widowed
Occupation: _____		Employer: _____		Job Title: _____

CLIENT PARTNER INFORMATION

<input type="checkbox"/> Id: (2)	<input type="checkbox"/> Driver's License	<input type="checkbox"/> Passport	<input type="checkbox"/> Birth Certificate	<input type="checkbox"/> Other
Id #: _____ Exp: / /		<input type="checkbox"/> New Client <input type="checkbox"/> Previous Client		
Name: _____				
Address: _____				
Cell Ph: _____		Work Ph: _____		Home Ph: _____
Email (P) _____			Date of Birth: _____	
SIN: _____		Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female		Marital Status: Married / Common Law / Divorced /separated / widowed
Occupation: _____		Employer: _____		Job Title: _____

Contact Preference: E-Mail Text Telephone Mail

Documents Appointment Date: _____ Time: _____ Email Fax Drop Off

DEPENDANT INFORMATION

Dependent Name: _____ Date of Birth: _____

Dependent Name: _____ Date of Birth: _____

Dependent Name: _____ Date of Birth: _____



Dependent Name: _____ Date of Birth: _____

Mortgage Lender: _____ Maturity _____

Rental(s) Lender: _____ Address _____

Rental(s) Lender: _____ Address _____

RRSP Provider _____ Amount: _____

TFSA Provider _____ Amount: _____

RESP Provider _____ Amount: _____

LIF RRIF Annuities GIC & Funds

Employee Group Benefits

AUTHORIZATION

Signature of Applicant

Date

Signature of Co-Applicant

***Disclaimer:** This information will be utilized by APlus to provide services to inform you of rate changes, products, programs, services and promotions from us that we believe may be of interest to you.

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.aplusinsurance.nf.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



10 Austin Street, Suite 105, St. John's, NL A1B 4C2
Ph: 709.754-6507 | Fax: 709.754.2160
www.aplusinsurance.nf.ca | admin@aplusinsurance.nf.ca



APlus Mortgage
Group Inc.

Mortgage Gift Card

Client: John Smith

Client #: AP1-EE123456

This Gift Certificate entitles you to a \$500.00 gift card from any of our partners in the APlus Preferred Partnership Program upon closing of a new mortgage, or switch/refinancing of an existing mortgage. Mortgage must be funded through APlus Mortgage Group Inc.¹

Certificate has no cash value.

Lawrence R George

Lawrence R George
President & CEO
APlus Group of Companies

¹\$500 Gift Card(s) paid by APlus Mortgage Group Inc.
Gift Cards are with partners in the APlus PPP
Or \$500 towards Lawyers closing costs

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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



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

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 a 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.



100% Proceeds Go to the Daffodil Place

 <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>Newfoundland Dogs</p>	 <p>BURGERS HOT DOGS</p>
 <p>Join the Staff from Get Air for Fun Games & Prizes</p>	



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

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



A Plus Accounting Services Inc.

APPOINTMENT REQUEST FORM

Client 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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APlus Insurance/Financial Group Inc.

APlus Mortgage Group Inc.

APlus Accounting Services Inc.

APlus Preferred Partnership Program

APlus Kid Konnection Program

Serving your financial needs for more than 30 years!

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