

Hello QFS Advisors,

Attached you'll find a mortgage tracking sheet that you can use to capture your client's current mortgage information.

With this information, we can keep track of the client's mortgage throughout the term, and identify opportunities to save them money.

When rates shift, there's often a window of opportunity where the interest savings realized by refinancing into a lower rate product are greater than the costs of doing so.

We'll compare their current rate and product to what the market is offering, and when we find an opportunity, you will receive all the information you need to have a discussion with your client about how you are about to save them money.

If an opportunity mid-term does not present itself, at the very least we'll have the client's mortgage renewal date on hand so we can approach them well in advance of their current lender and win their business.

Please reach out if you have any questions.

Thanks
Paul

Paul Sarantis, CPA, CA
Mortgage Broker
FSCO Lic# 13009

QFS Mortgage and Lending
Tel 647.776.4013 | Fax 647.776.0974
paul.sarantis@qfsmortgage.com
www.qfsmortgage.com

Mortgage Tracker:

By providing us with the information below, we will track your mortgages and notify you if an opportunity arises that will save you money. We will also make sure to notify you well in advance of any renewal date that rolls around. Most lenders will notify their existing clients 30 days before a renewal. With our office, we will notify you at least 120 days before hand, which is the longest period that we can hold onto a rate. Don't let the big banks make all the money; it's time that you enjoyed some of it as well.

Personal Detail:

Name:
Address:
City:
Postal Code:
Phone Number:
Email:

Property Detail	Property #1	Property #2
Property Address		
Estimated Property Value		
Mortgage Amount		
Current Lender		
Current Interest Rate Fixed or Variable		
Mortgage Renewal Date		
Number of Units		
Annual Rental Income		
Annual Property Tax		

Property Detail	Property #3	Property #4
Property Address		
Estimated Property Value		
Mortgage Amount		
Current Lender		
Current Interest Rate Fixed or Variable		
Mortgage Renewal Date		
Number of Units		
Annual Rental Income		
Annual Property Tax		

Do you consent to receiving periodic email updates regarding mortgage information? Yes
No

