



Welcome to the MrTaxes.ca Referral Partner Program. We look forward to taking care of all your client mortgage related document and tax needs.

Mortgage Broker Personal Info (all fields required):

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Email: _____ Phone: _____

Signature: _____

Payment:

The credit card number below shall be used to pay for orders through the MrTaxes.ca referral partner program for net balances at the end of each month.

Credit Card #: _____

Name on card: _____ Expiry: _____

(Credit card will be billed net 10 days monthly on all previous months' orders. Declined payments will be billed an additional \$15 and overdue accounts at 1% per month. Statements from MrTaxes.ca Inc.)

For office use only: Loyalty ID#: _____ Date: _____

**MrTaxes.ca Inc. and MrInsurance.ca Inc.
200 - 375 Water Street - Suite 888
Vancouver BC V6B 0M9**

Terms and Conditions subject to change without prior notice.



Welcome to the MrTaxes.ca Referral Partner Program

Thank you so much for your loyalty to our brands, products and services.

As a Referral Partner, you are now eligible to obtain our Standard NOA Package at no cost if you refer us to your clients. For every meeting with a client you refer us to you receive a credit of \$100.

This is how the Referral Program works:

What your client get's from MrInsurance.ca and MrTaxes.ca:

- Full financial review for your clients including a free ten-year tax review
- Insurance needs analysis from a licensed insurance advisor
- Closing gift of \$50 to be used towards any of our services

What you get from MrTaxes.ca and MrInsurance.ca:

- Peace of mind that your client's document and financial needs are covered
- NOA's and tax related documents on credit
- Business cards printed by us with you on one side and us on the other
- Referrals through our website (link) from rotating banner on our site
- No obligation insurance needs analysis and quote

What we require from you:

- Great mortgage services for our clients
- NOA, tax and insurance on your website services drop down
- Services link for NOA, tax and Insurance on your Facebook page

How does this service work? Our 24 business hour Guarantee remains in place, however your referral orders are placed in priority. Order the same as the old way (www.MrTaxes.ca/poi) from your end for NOA retrieval instead of paying at the end now you will choose to be invoiced. You will not have to pay for each order at the time of ordering, but rather, we will keep your credit card on file and bill you monthly for any offsetting balances against your referrals.

You may share your loyalty ID# with colleagues or client's, however, all documentation will be sent to you and your credit card will be charged for all orders net of credits each month and you will receive a statement.

If you would like your client to pay for their own order, then you just go through the regular web portal and your client will pay the regular \$50 fee. (www.MrTaxes.ca/poi)

Your client will receive an email with each order explaining who we are and why you are using MrTaxes.ca Inc. to retrieve NOA's and/or a meeting with a licensed insurance advisor from MrInsurance.ca. In this email we will offer your clients the opportunity for a no-obligation 10 Year Free Personal Tax and Review and discount offers as a value-added bonus to your service.

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