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SYSTEMS

Velocity Release Notes

Release Date: January 19th, 2024

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Overview


The January 19th, 2024 Velocity Broker Release includes enhancements to:

- VelocityCRM
- Annual Report (AR)



Elevate your CRM Experience with more Automation

You can now add your profile image and mobile application link into your profile page, and it will automatically insert them into your templates!



Action needed!

Are you protected if the unexpected happens?

You received a Manulife Protection Plan (MPP) mortgage life and disability link in our mortgage commitment email.

We are legally obligated to have all of our clients either accept or waive MPP coverage. You must click the link below to complete this process. Your mortgage file is not complete until we have the accepted or waived details on file.


[Complete the process](#)

When this is completed and all other conditions of your mortgage commitment are met, we will be able to proceed with providing mortgage instructions to your lawyer (purchases) or to First Canadian Title (for all refinances or mortgage transfers).

This is an important and required step in the mortgage process.

Please let us know if you have any questions

Thank you!
Link to my App - [mobile app](#)



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<https://velocity-sso-sit.newton.ca/sso/public.php?sc=bh5gamr81y6i4>



Updates & Additions to the Annual Report (Formerly called the AIR)

We have added a drop-down to the Annual Report (AR) to allow for provinces that require Annual Reporting. The time range of the report will display the fiscal or calendar year for the report based on the requirements of that province.

Provinces with Annual Reports:

- New Brunswick
- Nova Scotia
- Ontario
- Saskatchewan

☰ Annual Report


The regulatory authority overseeing financial services in a province utilizes the information provided in the Annual Report to identify, assess, and monitor risk within the mortgage brokering sector.

Velocity is here to help!

Below, we have provided information to guide you through the Annual Report filing process. **Please note that our information is specific to Velocity, and we can only provide details related to our platform. Submissions from or to lenders through other applications are not covered.**

The deadline for submitting the Annual Report varies for each province. For additional resources and information, please visit the website of the relevant regulatory body.

Province: AIR Year: Format:



Clear Cache

Due to our system update, be sure to clear your cache for optimal deal screen performance!

If you need instructions on how to do so, please click the relevant link below.

[Clear Cache - MAC](#)

[Clear Cache - PC](#)





About Us

As a smart man once observed; "An object in motion tends to remain in motion along a straight line unless acted upon by an outside force." **We're that force!** The force that moves you from that straight, flat line to increasing your sales, improving your clients and lender's satisfaction while reducing your cost, time and aggravation. Our goal is fulfilling your needs and exceeding your expectations. Newton provides a complete range of hosted and licensed system solutions capable of achieving seamless straight through processing of mortgage applications from initial customer enquiry to final mortgage advance.

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