

Ticket #16036 Tricia McDonald #131-Opt out

Ticket submitted 20 hours ago by Jessica Wildeman

PriorityMed
Due DateNone
AssigneeBrenda Dillabaugh
CategoryProperty Taxes
Time Spent0m
Last Activitya few seconds ago

This has been completed. \$191.49 from mortgage to property tax account.

a few seconds ago by Brenda Dillabaugh (Assignee)

In order for the member to opt out I need to close the property tax account I will just take it from the mortgage like we did in previous years when we brought it to zero. This way we do not need to contact the member again.

17 hours ago by Brenda Dillabaugh (Assignee)

Can you please opt her out of future collections of the property taxes
We will follow up with the member of what to do with the deficit.
Thank you.

18 hours ago by Jessica Wildeman (Creator)

Hi Jessica

We have been sending out letters giving them the option of opting out since 2012 but in 2014 letter it had on there that we will be charging \$75.00 commencing 2015. Please see attached letter from 2014 that was sent out each month after taxes were paid in 2014. Unfortunately the direction that was given to us was not to refund as the member had notice that we would be charging. She has a short fall in the property tax account does she want to bring it to zero from her chequing account or are we disbursing it off of the mortgage?
Thanks

19 hours ago by Brenda Dillabaugh (Assignee)
Property tax Letter - FINAL.docx

Assigned to Brenda Dillabaugh.

19 hours ago by Brenda Dillabaugh (Assignee)

[Description:]

Tricia called to state that she would like to opt out of us collecting her property taxes with her mtg. Will this decrease her mtg payment by that exact amount? She states that she only received a letter yesterday about this and is upset about not being notified that she would be charged the \$75 fee (which she was charged in June 2015). Can this be reversed? There are no notes on when/if she was sent a letter previously. Thank you.

20 hours ago by Jessica Wildeman (Creator)

Users

Assignee
Brenda Dillabaugh

Creator
Jessica Wildeman
jessica.wildeman@synergycu.ca
306.825.3301

CC'd Users
+ Add
Diane Taylor

Ticket History

Created
20 hours ago

Last Activity (Admin)
a few seconds ago

Last Activity (Creator)
18 hours ago

Related Items

+ Add

Additional Details

You can track additional information on a ticket with custom attributes.