

David W

★★★★★ Sep 3, 2019

As newlyweds, my wife and I needed some help with our taxes and we were also in need of some financial advice. Chad set aside time to meet with us during the busy tax season and provided insightful and important tips to help us with our financial goals.

Recently, Chad reached out to me based on our financial discussion earlier this year. He recommended a refi on our mortgage based on his analysis of our interest rate. We had already been considering doing a refi because the rates were real low and we wanted to shorten the term so his call was perfect timing. Most mortgage brokers want to sell you a product and get you in and out so they can move on and get to the next potential client. Chad doesn't do that. He asked me several questions about what we wanted in a home loan; he listened. Chad carefully crafted a loan package based on our conversation. We were able to shorten the term and save thousands of dollars on the life of the loan with minimal change in monthly payments.

The refi process has been a breeze! Chad is extremely organized and communicates with you the entire time. He will answer any questions you have and navigate you through the process. He is super knowledgeable on the current trends in the mortgage and tax arena. He even has a very useful blog that helps educate the client.

We will continue to use Chad for tax services and financial coaching. I don't think we will need to refi again but if Chad thinks he can save us more money to get us closer to our goal of paying off our mortgage, I would trust his advice and work with him again. He's that good!



Peshke Financial