

Referral

Email: brokers@heartlandbank.com.au

To: **Heartland Bank Customer Service Team**

Referrer details

Date: _____

From (**referrer**): _____

Aggregator/referral code (if applicable): _____

Referrer address: _____

Referrer's contact phone number: _____

Referred applicant name(s): _____

I refer to the above applicant(s), who has approached us in relation to reverse mortgage loans. The applicant(s) has requested that the Heartland Bank Customer Service Team contact him/her to discuss reverse mortgage loans.

Applicant Details

Referral applicant(s) phone number: _____

Applicant(s) mobile phone number: _____

Best date/time to contact: _____

Security property address: _____

Loan purpose: _____

Please find below confirmation from the above applicant(s) that they consent to the Heartland Bank Customer Service Team contacting them.

Applicant(s) to complete:

I/we _____ and _____,

- (a) have read and understood this referral application and I agree to information being collected and dealt with in accordance with this with our Privacy Policy and Credit Reporting Policy which are available on our website.
- (b) **consent** to the referrer collecting and disclosing to Heartland Bank the details contained in this form, and request that Heartland contact me/us to discuss reverse mortgage loans; and
- (c) **acknowledge and understand** that the referrer will, if Heartland Bank approves my/our application and provides me/us with credit, receive a referral fee of \$300.00 plus GST paid by Heartland Bank in respect of my/our loan application as referred to Heartland Bank by the referrer, upon settlement by Heartland Bank of a new loan to me/us in terms of that application.

Applicant(s) to sign:

Name: _____ Date: _____

Signed: _____

Name: _____ Date: _____

Signed: _____