

Client Referral Form

Step 1: Client Information *(Please completely fill out the form)*

Customer #1 *(Customer must be at least 55 years of age)*

Title _____ First Name _____

Last Name _____

Date of Birth (DD/MM/YY) _____

Street Address _____

City _____ Province _____

Customer #2 *(Customer must be at least 55 years of age)*

Title _____ First Name _____

Last Name _____

Date of Birth (DD/MM/YY) _____

Postal Code _____ Telephone _____

Email Address _____

Step 2: Information About the Home *(Please completely fill out the form)*

Type of Home

- Detached
- Condo-Apartment
- Townhouse
- Condo-Townhouse
- Duplex
- Semi-Detached
- Triplex
- Semi-Detached (QC)
- Mobile Home
- Modular Home
- Rural Acreage

Expected Use of Funds *(check all that apply)*

- Major Purchase
- Travel
- Income/Investment
- Pay Debt
- Home Renovation
- Estate Planning
- Family Gifts
- Health Care

Market Value of Home

\$ _____

Amount of Deferred Property Tax
(BC Only)

\$ _____

Amount of Existing Mortgage,
Secured Line of Credit

\$ _____

Step 3: Referral Partner Information *(Please completely fill out the form)*

First Name _____

Title _____

Transit Number _____

City _____

Postal Code _____

Email Address _____

Last Name _____

Company Name _____

Company Street Address _____

Province _____

Telephone Number _____

Fax Number _____

Authorization

CHIP Reverse Mortgage and Income Advantage is provided by HomeEquity Bank, a Schedule I Canadian Bank.

I direct the Referrer to submit this completed Client Referral Form to HomeEquity Bank. I confirm that the client information above has been provided by me and that it is correct. I authorize HomeEquity Bank to (1) disclose to the Referrer details of my reverse mortgage so that the Referrer may serve me better, including assisting me with investing the funds (where applicable) and/or (2) provide to the Referrer, if requested, copies of my reverse mortgage documentation so that the Referrer can maintain its records as required by internal policy or regulation. I have been informed that HomeEquity Bank and the Referrer have a referral agreement under which HomeEquity Bank pays a fee to the Referrer if I obtain a reverse mortgage. I consent to HomeEquity Bank contacting me by mail, phone or electronic message to discuss obtaining a reverse mortgage. I understand that I may withdraw my consent at any time.

Date _____

Date _____

Customer #1 Name _____

Customer #2 Name _____

Customer #1 Signature _____

Customer #2 Signature _____

