

## Referral

Email: [referrals@heartlandbank.com.au](mailto:referrals@heartlandbank.com.au)

**To:** Heartland Bank Customer Service Team

**Referrer details:**

Date: \_\_\_\_\_

From (**referrer**): \_\_\_\_\_

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: \_\_\_\_\_