Referral form

HEARTLAND
REVERSE MORTGAGES

Email: referrals@heartlandfinance.com.au

To: **Heartland 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 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 Customer Care Team contacting them:

Privacy Statement – The Referrer described above collects your personal information for the purpose of this referral and will record, use, and disclose your personal information (namely, that contained in this form) to Heartland Finance and any of its related bodies corporate, including Heartland Australia Group Pty Limited ACN 604 859 752 and its related bodies corporate (as that term is defined in the Corporations Act 2001 (Cth)), successors, assigns, agents and associates. These entities include ASF Custodians Pty Ltd ACN 106 822 780 and Australian Seniors Finance Pty Ltd ACN 108 875 636. ("**Heartland**"). You may access any personal information held about you by contacting us on. If complete details are not provided by you, we may be unable to refer you to Heartland.

Applicant(s) to complete:

I/we _____ and _____,

(a) **consent** to the referrer collecting and disclosing to Heartland the details contained in this form, and request that Heartland contact me/us to discuss reverse mortgage loans; and

(b) **acknowledge and understand** that the referrer will, if Heartland approves my/our application and provides me/us with credit, receive a referral fee of $300.00 plus GST paid by Heartland in respect of my/our loan application as referred to Heartland by the referrer, upon settlement by Heartland of a new loan to me/us in terms of that application.

Applicant(s) to sign:

Name: _____ Date: _____

Signed: _____

Name: _____ Date: _____

Signed: _____