

# Reverse Mortgage Referral Form

**HEARTLAND**  
BANK

Please complete this form and email it to your Reverse Mortgage Business Development Manager.

## CLIENT 1

Name	Age
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## CLIENT 2 (if joint)

Name	Age
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Phone	Email
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Address of client property
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Estimated property value
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Is there a mortgage on the property?	Yes	No	If yes, what is the amount
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Is there any information on the client's background that will help process their application?
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Does the client have any questions or comments?
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Referrer company
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Referrer name
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Phone	Email
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### Privacy Declaration:

In this declaration, "**Heartland**", "**we**" or "**us**" means Heartland Bank Limited, and its related entities, successors, assigns, agents and associates, and "**you**" means each person named in this referral form as "**Client**". Heartland is collecting information about you in accordance with the Privacy Act 2020 and our Privacy Statement, and we may not be able to provide you with products or services if you do not provide that information. That information may be used by us to consider, respond to and manage this referral, including to establish and verify your identity and for the other purposes described in our Privacy Statement (which you can find on our website). You agree that - for those purposes - we can provide information about you to, and obtain information about you from, other organisations or people we consider appropriate. Those organisations might include our related companies, existing and potential business partners, intermediaries and referrers, credit reporting agencies (who may also retain information (including default information) and use it to provide credit reporting services), property and driver licencing registries, service providers (including data storage services), other financial and insurance institutions, government departments, your advisors (as authorised by you), emergency contacts named by you, third parties for the purposes of fraud prevention, identity verification, and any other purposes relevant to those purposes (those third parties may retain information and use it for identity verification and fraud detection purposes), Heartland's approved dispute resolution scheme and other persons described in our Privacy Statement.

You have rights to access and request correction of your personal information under the Privacy Act 2020. You can do so by contacting us using the details provided on [heartland.co.nz/contact-us](https://heartland.co.nz/contact-us)

### By proceeding, you acknowledge that each person named as "Client" in this referral form:

- has read the Privacy Declaration above and agrees to its terms;
- has confirmed that all information provided in this form is correct, complete and not misleading;
- has confirmed that no person named as "Client" in this form is an undischarged bankrupt; and
- approves the sharing of their information with Heartland Bank Limited.

**Do you have questions?** Contact the team on **0800 488 740** or [advisorsupport@heartland.co.nz](mailto:advisorsupport@heartland.co.nz). We're here to help.