

BMO Bank of Montreal Personal and Mortgage Lending

Introduction for use with

World Financial Group Canada Inc. ("WFGC") referrals

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|--|----------|---|--------------------------|
| Fax or Email this Form directly to a BMO Bank of Montreal Lending Specialist assigned to your region and a copy must be kept for your records for proper tracking of referral fees. NOTE: To avoid delays, please ensure that all forms are clearly and fully completed prior to submission. | | | |
| Borrower #1 | | Borrower #2 | |
| Salutation: <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Miss <input type="checkbox"/> Dr. | | Salutation: <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Miss <input type="checkbox"/> Dr. | |
| First Name | Initial | Last Name | |
| Address | | Apt. # | <input type="checkbox"/> |
| City | Province | Postal Code | |
| Contact Numbers: (home) _____ (cell) _____ | | | |
| Best time to call: Day (mm/dd): _____ time: _____ | | | |
| Or | | | |
| Evening: | | mm/dd | time: |
| Fax number: | | | |
| Email Address: | | | |
| Product Required: <ul style="list-style-type: none"> <input type="radio"/> Fixed Rate personal loan <input type="radio"/> Variable Rate Installment Personal Loan <input type="radio"/> Home Equity Loan Plan <input type="radio"/> Personal Line of credit <input type="radio"/> Homeowner line of credit <input type="radio"/> Homeowner Readiline <input type="radio"/> Personal mortgage | | | |
| Authorization | | | |
| You hereby authorize a WFGC Associate and WFGC to disclose the information on this Introduction Sheet to BMO. | | This referral Fee is calculated as follow: | |
| BMO collects personal information in this Referral Form and throughout the applications process. Personal information is any information that identifies you. It may include information such as your age, marital status, employment history, income, social insurance number, credit history, home address, email address, and home telephone number. BMO requires your personal information in order to administer and collect your accounts to carry on business with you, and to comply with the law. | | <ol style="list-style-type: none"> 1. HOLC/HRLC/PLOC (revolving portion) Products: The Bank shall pay a onetime payment of 40 basis points on 50% of all authorized limits booked in each month. 2. HRLC (installment portion)/Personal Mortgage Products-Open facilities or facilities with a term of less than 3 years: The Bank shall pay a onetime payment of 20 basis points on the total of all balances outstanding at the end of the month for funds advanced in that month. 3. HRLC (installment portion)/Personal Mortgage Products-Closed facilities with a term of 3 years or more: The Bank shall pay a onetime payment of 40 basis points on the total of all balances outstanding at the end of the month for funds advanced in that month. 4. PLPV/HELP/PLP Products: The Bank shall pay a onetime payment of 50 basis points on the total of all balances outstanding at the end of the month for funds advanced in that month | |
| You the undersigned, acknowledge that the relationship between WFGC and BMO, including the payment of referral fees and bonuses, has been fully explained to you, with regard to the agreement between WFGC and BMO and acknowledge that: | | | |
| WFGC has entered into a referral agreement (the "Agreement") with BMO. Under this agreement, the representatives of WFGC can refer individuals including you, to BMO for Person Lending Products and receive referral fees for those clients who fund their personal lending with BMO. | | | |
| Referred Signature | | | |
| X | | X | |
| Referred Name (Please Print) | | Referred Signature | Dated (MM/DD/YYYY) |
| Associate Information | | | |
| _____ Associate Name | | _____ Associate Code | |
| Associate Email: | | Branch Address/Phone: | |