



REFERRAL AGENT MEMBERSHIP FORM

INFORMATION

I prefer correspondence in: ☐ English ☐ French

Last Name

First Name

Company Name

OFFICE MAILING ADDRESS

Street

City

Province

Postal Code

CONTACT INFORMATION

Phone

Cell Phone

Email

Fax

Company Website: www.

OCCUPATION TYPE

☐ Mortgage Broker/Agent

☐ Financial Advisor

☐ Trustee in Bankruptcy

☐ Credit/Debt Counsellor

☐ Website Marketing

☐ Auto Finance

☐ Immigration Service

☐ Other: _____ How long have you been in business: _____

APPLICATION VOLUME

How did you hear about the Agent Referral Program? _____

What is your estimated volume of applications per month: _____

How will referrals be generated (advertised): ☐ Website* ☐ Direct Contact ☐ Newspaper Ads* ☐ Email**

☐ Other: _____

* Print and website advertising must be approved by Peoples Trust.

** PTC PROHIBITS THE USE OF OUR PRODUCTS AND SERVICES IN ANY MANNER ASSOCIATED WITH THE TRANSMISSION, DISTRIBUTION AND DELIVERY OF UNSOLICITED COMMERCIAL ELECTRONIC MESSAGES (CEMS). For more information, please refer to the Peoples Trust Company Anti-Spam Policy and Procedures. To obtain a copy of the Peoples Trust Company CASL policy, please contact us at 1-877-694-6200.

MONTHLY COMMISSION PAYMENT INFORMATION

Payable to: _____

Mail to: ☐ Office Mailing Address as above

☐ Other: _____

Disclaimer

I, the undersigned, certify that the information I provide on this form is true and correct; and by signing below I have read and accept the terms and conditions outlined in the Peoples Trust Referral Service Agreement. I confirm that I am of legal age in the Province of my residence on the effective date of this agreement. I agree that Peoples Trust may send me information updates by email or other means from time to time. I understand and will comply with the marketing and advertising requirements.

Signature: _____ Date: _____

For immediate processing, fax to 640-694-6209 or email to SecuredCard@peoplestrust.com

FOR OFFICE USE ONLY – MEMBERSHIP FORM APPROVAL

Authorized Signature: _____ Date: _____

5 Digit Code
□ □ □ □ □