



# SMART Loan Referral Card

Telephone: 1.877.702.7627  
Fax: 1.877.708.7627

E-mail: smartloan@b2bbank.com  
Web: b2bbank.com/smartloan

Hours of Operation:  
Monday to Friday 9:00 a.m. to 11:00 p.m. (ET)  
Saturday 9:00 a.m. to 5:00 p.m. (ET)

**Fax the original copy of this Referral Card toll free to B2B Bank Head Office: 1.877.708.7627** Referral # \_\_\_\_\_

Please print clearly and press firmly to ensure transfer of information onto carbon copy.

## 1: INTRODUCTION INFORMATION

Salutation:  Mr.  Mrs.  Ms.  Miss  Dr.  
Language Preference:  English  French

First name \_\_\_\_\_ Initial \_\_\_\_\_ Last name \_\_\_\_\_

Address \_\_\_\_\_ Apt.# \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

( )

Fax \_\_\_\_\_ Email address \_\_\_\_\_

Salutation:  Mr.  Mrs.  Ms.  Miss  Dr.  
Language Preference:  English  French

First name \_\_\_\_\_ Initial \_\_\_\_\_ Last name \_\_\_\_\_

Address \_\_\_\_\_ Apt.# \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

( )

Fax \_\_\_\_\_ Email address \_\_\_\_\_

## 2: SCHEDULING YOUR APPOINTMENT

Within 5 Business Days of receiving your referral card, a B2B Bank Referral Coordinator will call you to schedule an appointment with a Lending Specialist. In the "Preferred Appointment Time" section, please indicate your preferred time for the B2B Bank Referral Coordinator to schedule your appointment. If your preferred time is not available, the B2B Bank Referral Coordinator will work with you to schedule your appointment at another time that is convenient for you.

### Preferred Appointment Time:

(Please see above for our hours of operation.)

Day of the week \_\_\_\_\_ Time \_\_\_\_\_ to \_\_\_\_\_  AM  PM ( )  
Daytime contact number \_\_\_\_\_

Day of the week \_\_\_\_\_ Time \_\_\_\_\_ to \_\_\_\_\_  AM  PM ( )  
Evening contact number \_\_\_\_\_

**Apply online and receive our SMART Priority Service.**

## 3: AUTHORIZATION

By completing and signing this Referral Card you:

- acknowledge that you have read, understand and agree to the information set out in the Notice (on the reverse of this Referral Card);
- authorize Primerica Life Insurance Company of Canada (PLICC) and the Representative, or alternatively, if the Representative is acting on behalf of PFSL Investments Canada Ltd. (PFSL), you hereby authorize PFSL and the Representative, to provide this Referral Card and the information contained herein to B2B Bank for the purpose of introducing you to B2B Bank and;
- authorize B2B Bank to use the information contained herein to contact you about a possible mortgage loan from B2B Bank.

Applicant signature \_\_\_\_\_

Co-applicant signature \_\_\_\_\_

Date (mm/dd/yyyy) \_\_\_\_\_

Date (mm/dd/yyyy) \_\_\_\_\_

## 4: REPRESENTATIVE INFORMATION (to be completed by referrer)

### Primerica Associate/Representative:

Name \_\_\_\_\_ Solution number \_\_\_\_\_ Phone number \_\_\_\_\_

Email address \_\_\_\_\_

RVP name \_\_\_\_\_ Solution number \_\_\_\_\_ Phone number \_\_\_\_\_

Email address \_\_\_\_\_

### Primerica Representative:

Name \_\_\_\_\_ Solution number \_\_\_\_\_ Phone number \_\_\_\_\_

Email address \_\_\_\_\_

RVP name \_\_\_\_\_ Solution number \_\_\_\_\_ Phone number \_\_\_\_\_

Email address \_\_\_\_\_

In Alberta, Representatives must be licensed life insurance agents or authorized representatives of PLICC. If an Alberta Representative holds both a life insurance agent's license and a mutual fund license, the Representative must at all times be acting solely in the capacity of a licensed life insurance agent of PLICC in order to be eligible to participate in the SMART Loan Referral Program.

In Quebec, Representatives must be certified with the Autorité des marchés financiers as a mutual fund representative and/or a representative in insurance of persons in order to be eligible to participate in the SMART Loan Referral Program.

### PFSL Representative shall check and complete below:

(a)  I, \_\_\_\_\_, hold a mutual fund representative's license and I am a representative of PFSL Investments Canada Ltd., a registered mutual fund dealer.

(b) Is this a split referral?  Yes  No