

Financial Benefits

Member & family referral form

COMPANY/ORGANIZATION INFORMATION

Company/organization name

Company/organization address

City

State

Zip code

Email

Phone

FINANCIAL BENEFITS MEMBER INFORMATION

Member's name

Submitter's address

City

State

Zip code

Email

Phone

SELECT ONE

Member

Family member

Family member relationship* (if applicable)

AREAS OF NEED (Check all that apply)

Mortgage/home equity lending

Consumer banking

Wealth management

Other (please specify)

*Family is defined as follows, regardless of actual or perceived sexual orientation, gender identity, or legal marital status: child, parent, or grandparent. A child is defined as a son, stepson, daughter, or stepdaughter. A parent or grandparent includes a stepparent/grandparent or foster parent/grandparent; spouse or domestic partner; legally adopted son or daughter, including a child who is placed with the borrower by and authorized agency for legal adoption; foster child; brother, stepbrother; sister, step-sister; uncle, aunt; son-in-law, daughter-in-law, father-in-law, mother-in-law, brother-in-law, sister-in-law, or cousin of the referrer.

