

# REFERRER ACCREDITATION INFORMATION SHEET



Referred by: \_\_\_\_\_  
 \*Applying accreditation for:  
 Auto Loan     Home Loan     SME Loan

\*Referrer type:  
 Broker     Developer  
 Contractor     Individual

## PERSONAL INFORMATION

\*Name (First, Middle, Last) \_\_\_\_\_ \*Gender  Male  Female

\*Date of Birth (mm/dd/yyyy) \_\_\_\_\_ Age \_\_\_\_\_ \*Place of Birth \_\_\_\_\_ \*Civil Status  Single  Married  Separated  Widow/er  Annulled/Divorced \*Citizenship  Filipino  Foreigner, ACR No. \_\_\_\_\_

\*Present Residence Address (No./Street/Barangay or Municipality/City/Province) \_\_\_\_\_

Zip Code \_\_\_\_\_ Length of Stay \_\_\_\_\_ \*TIN \_\_\_\_\_ \*SSS/GSIS No. \_\_\_\_\_  
 \_\_\_\_\_ Years \_\_\_\_\_ Months

Home Ownership  Owned  Rented  Mortgaged  Used Free  Living with Relatives \*Residence Tel. No. (Area Code, Number) \_\_\_\_\_ \*Mobile No.  Postpaid  Prepaid

\*Present Employer / Business Name \_\_\_\_\_ \*Business Address (No./Street/Barangay or Municipality/City/Province) \_\_\_\_\_

\*Office Tel. No. (Area Code, Number) \_\_\_\_\_ Fax No. (Area Code, Number) \_\_\_\_\_ \*E-mail Address \_\_\_\_\_

BDO Savings/Current Account No. (for crediting of commissions/incentives) \_\_\_\_\_

## AREA OF CONCENTRATION

Metro Manila     North Luzon     South Luzon     Visayas     Mindanao

## OTHER BANK ACCREDITATION

Bank	Date Accredited

## REAL ESTATE RECORD (if applying for Home Loan or SME Loan Referrer)

No. of years in Real Estate Business \_\_\_\_\_

License No. \_\_\_\_\_ Field of Specialization  Vacant Lot  Condo/Townhouses  Low Value  High Value  
 House and Lot  Others \_\_\_\_\_  Medium Value

## SALES RECORDS

Name of Projects/Brand of Car	Developer/Dealer	No. of Units Sold

## SPOUSE INFORMATION

\*Name (First, Middle, Last) \_\_\_\_\_ Gender  Male  Female

\*Date of Birth (mm/dd/yyyy) \_\_\_\_\_ Age \_\_\_\_\_ Citizenship  Filipino  Foreigner, ACR No. \_\_\_\_\_

TIN \_\_\_\_\_ Mobile No.  Postpaid  Prepaid

Present Employer / Business Name \_\_\_\_\_ Business Address (No./Street/Barangay or Municipality/City/Province) \_\_\_\_\_

Office Tel. No. (Area Code, Number) \_\_\_\_\_ Fax No. (Area Code, Number) \_\_\_\_\_ E-mail Address \_\_\_\_\_

## FAMILY BACKGROUND

Name (First, Middle, Last)	Date of Birth (mm/dd/yyyy)
Father	
Mother	
Children	

## PERSONAL REFERENCES

Name (First, Middle, Last)		Relationship
Company Name	Position	Tel. No. (Area Code, Number)
Name (First, Middle, Last)		Relationship
Company Name	Position	Tel. No. (Area Code, Number)
Name (First, Middle, Last)		Relationship
Company Name	Position	Tel. No. (Area Code, Number)

I hereby certify that the above data are true and correct. I commit to abide by BDO Unibank Inc.'s rules and regulations for referrer accreditation.

\_\_\_\_\_  
Signature over Printed Name

\_\_\_\_\_  
Date

## REFERRER UNDERTAKING

I, (First, Middle, Last) \_\_\_\_\_, do hereby undertake to abide by the following terms and conditions for referrer accreditation.

- I acknowledge that accreditation is at the sole discretion of BDO Unibank, Inc. (BDO), which may grant or deny accreditation in its sole judgement and regardless of the outcome of my performance during that period. I agree that I have no cause of action against BDO for the grant or denial of accreditation.
- I am not an agent, joint venturer, nor a partner of BDO with regard to my function as independent contractor. Likewise, any person that I may hire or contract shall not be considered a BDO employee, agent, or sales representative. BDO shall deal directly with me alone with regard to my function as independent contractor.
- I shall ensure that all signages, IDs, calling cards, stationeries and other similar materials to be used and not provided by BDO (or BDO subsidiary/affiliates) do not include marks, logos and/or corporate brand prints. I further agree that I shall not use or refer or allow the use or reference to the name, mark and/or logo of BDO (or any BDO subsidiary/affiliate) or any of its products in any advertising or marketing material or correspondences (whether via mail, SMS or any other mode of communication, whether verbal or written), without the prior written consent of BDO.
- I shall ensure to follow up from my prospects the requirements deemed necessary for the processing of their applications with BDO.
- I shall safeguard, according to strict standards of security and confidentiality, any information my customer shares with me.
- I shall ensure that the details contained in the application forms are complete and accurate to the best of my knowledge and that photocopies of documents are true reproductions of the original.
- I understand that approval or disapproval shall be subject to the sole or absolute discretion of BDO. I shall have no right to object to the exercise of discretion by BDO.
- BDO is hereby authorized to terminate unilaterally my accreditation in case of failure on my part to comply with the Terms and Conditions set by BDO.
- I understand that in the event of termination, I shall return within 24 hours from notice of termination of BDO all materials pertaining to BDO programs, including but not limited to, prospect lists, communication and others and that I shall not thereafter use, for any purpose, any material which bears BDO's name and/or logo/trademark.
- I understand that I shall no longer be credited for approved and/or booked applications after the date of termination of my accreditation.
- I understand that in the event that I shall decide to dispose of, or cease or discontinue my business, I shall give BDO at least thirty (30) days prior written notice.
- I understand that my accreditation shall be subject to review every twelve (12) months or as often as deemed necessary by BDO.
- I hereby separately agree to indemnify and hold BDO, its parent company, affiliates, subsidiaries, and their respective officers, directors, employees, and representative, free and harmless from any loss, claim, damage, cost or expense of any kind including reasonable attorney's fees that may arise as a result of my acts.
- I shall conduct my business and regulate my operations in a way that will maintain and increase the goodwill and reputation of BDO. I shall conform with and abide by all laws, rules, ethics, regulations and procedures required by BDO.
- I shall comply with all laws, rules and regulations in relation to the conduct of my business and shall conduct my business properly. In the practice of my profession, I shall observe fairness, good faith and honesty in dealing with my clients, including BDO.
- I shall not engage in false advertising and shall ensure that all my advertisements, brochures, announcements and other collaterals shall present the true picture of the property to be sold.
- I hereby represent and warrant that I have no unpaid past due obligation with BDO or any of its subsidiaries or affiliates. BDO is hereby authorized to unilaterally cancel my accreditation in the event that I fail to promptly pay or comply with any of my obligations with BDO or any of its subsidiaries and affiliates.
- I further irrevocably authorize and empower BDO, without need of any prior notice to me, to apply any commission, fees or all other such amounts which may be due me in relation to my accreditation with BDO or which may be in the possession of BDO to the payment of any of my unpaid obligations with BDO. This authority is coupled with interest and may not be revoked by me at will.
- I hereby authorize BDO to automatically credit my commission, fees or all other such amounts, which may be due to me in relation to my accreditation with BDO, to my BDO Savings/Current Account No. \_\_\_\_\_ maintained at \_\_\_\_\_ branch. I shall accordingly advise BDO in writing in the event that I decide to cancel effectivity of the said authorization.
- I hereby authorize BDO to obtain relevant information from other institutions/persons concerning my referrer accreditation and agree that all such data, information, or documents obtained by BDO in relation to my referral shall remain BDO's property.

I hereby affirm and confirm that I have carefully read the foregoing, fully understood the contents thereof, and have freely and knowingly signed my name hereon on the date stated below.

\_\_\_\_\_  
Signature over Printed Name

\_\_\_\_\_  
Date

SAVE

SUBMIT

RESET