

# Financial Benefits

BY BOK FINANCIAL



## Financial Benefits Organization and Family Member Referral Form

Organization/Membership Name and Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Member Name: \_\_\_\_\_

### Complete this section if referring a family member

Referred Family Member Name: \_\_\_\_\_

Address of Family Member: \_\_\_\_\_

Family Member Phone: \_\_\_\_\_

Family Member Email: \_\_\_\_\_

Relationship to Referring Party: \_\_\_\_\_

Areas of Need: Mortgage /Home Equity Lending/ Consumer Banking/ Wealth Management/ Other

\_\_\_\_\_

### **Internal Use Only**

Member Verified by: \_\_\_\_\_

Membership Card, Membership Roster, other (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, stepsister; 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.**