

Financial Institution Partnership Agreement



Date: _____

This document describes the agreement between _____ (hereinafter referred to as “Institution”) and AAXA Mortgage LLC., Reverse Mortgage Division (hereinafter referred to as “Provider”). Roles and responsibilities of each party are defined below, while benefits of the agreement for each party may have already been discussed and agreed to in principle in previous correspondence.

Institution Agrees to the Following:

- To provide space in branch facilities for Reverse mortgage marketing materials and placement to be in full view of customers or members.
- Personnel of Institution will be familiar with the material pertaining to Reverse mortgages that Provider will make available.
- Institution will market to the public that Reverse mortgages are available. This can be accomplished by handing out marketing material, talking to customers or members, advertising and sponsoring educational workshops in their community.
- Institution shall use Provider exclusively for all Reverse mortgage requests as long as agreement is in force.

Provider Agrees to the Following:

- Provider shall supply, at no cost to Institution, marketing materials for each branch Institution. Marketing material shall consist of:
 - ◊ Lobby poster sign for each branch.
 - ◊ Brochures on the basics of Reverse Mortgages and racks—to be placed on counters in each branch
 - ◊ Tags for personnel to wear stating “Ask Me About A Reverse Mortgage”.
 - ◊ Pre-Application information sheets supplied to each branch. This is to be completed for Provider to use in contacting Institution’s customer or member.
 - ◊ All marketing materials outlined in this agreement will be supplied by Provider to Institution at no cost.
- Provider will educate employees of Institution about Reverse Mortgages as well as supply educational material to employees.
- Employees of Institution will NOT be taking the loan application. However, it will benefit the Institution if employees have a certain degree of knowledge about reverse mortgages.

Either party can cancel this agreement at any time by a written notice given forty five (45) days prior to the cancellation date. All parties to this agreement shall acknowledge the terms by executing below:

Institution Date

Provider Date