

# Bank Reference Form

## SECTION 1: AUTHORIZATION TO RELEASE CLIENT INFORMATION

Instructions: Subcontractor to complete and sign Section 1 and forward it to bank or financial institution.

Bank Name \_\_\_\_\_ Transit No. \_\_\_\_\_  
 Address \_\_\_\_\_ Phone No. \_\_\_\_\_  
 Town/City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_ Fax No. \_\_\_\_\_  
 Account Manager \_\_\_\_\_ Email \_\_\_\_\_

I hereby authorize the Bank release the financial information described below to Stuart Olson Construction Ltd.

Subcontractor \_\_\_\_\_ Account No. \_\_\_\_\_  
 Signature \_\_\_\_\_ Print Name \_\_\_\_\_  
 Date \_\_\_\_\_ Title/Position \_\_\_\_\_

## SECTION 2: CLIENT INFORMATION

Instructions: Bank to complete Section 2 and return to Stuart Olson.

Client Since \_\_\_\_\_ Borrowing \_\_\_\_\_ Non-Borrowing \_\_\_\_\_

### Deposit Account Details

Average Balance \_\_\_\_\_ Has there been any NSF activity in the past year? Yes No

### Operating Loan Details

Authorized Limit \_\_\_\_\_ Current Usage \_\_\_\_\_ Expiry Date \_\_\_\_\_

Repayment History As Agreed? Yes No

*If no, please explain.*

Has the Subcontractor been in violation of any covenants in the past year? Yes No

*If yes, please explain.*

### Additional Comments

Signature \_\_\_\_\_ Print Name \_\_\_\_\_  
 Date \_\_\_\_\_ Title/Position \_\_\_\_\_

Submit Completed Bank Reference to: Risk Management Department  
 Email RiskManagement@stuartolson.com  
 Fax (403) 685-7770