Klarstig

Banking Client Referral

Introduce a person or organization to an appropriate service or contact. Explain the reason for the introduction and confirm permission to share the details.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Person or organization being referred *

Receiving service or contact *

Reason for referral *

Relevant needs and expected support *

Permission to share the stated information *

- ☐ Permission confirmed
- ☐ Permission still needed
- ☐ No personal details are being shared

Permitted contact details for the referred party

Timing or availability constraints

Specific details

Client organization or project reference

Complete when relevant to this request.

Services needed and the outcome the client expects

Operating context

Branch department or service reference

Complete when relevant to this request.

Authorized contact and handling requirements without account credentials

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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