



CLIENT INFORMATION

Date (dd-mmm-yy):	How did you hear about CFH?				
Business Analyst:					
PERSONAL INFORMATION					
First Name:	Last Name:				
Home Address:					
City:	Province:	Postal Code:			
Phone: (H)	(C)	(W)			
Email:					
SIN:	Date of Birth (dd-mmm-yy):	# of Dependants:			
Gender:	Male	Female			
Marital Status:	Married	Single	Common Law	Separated	Divorced
Education:	High School Graduate	Some Post-Secondary Education			
	Trade Certificate	College Graduate	University Graduate		
Status:	Canadian Citizen	Immigrant/Permanent Resident			
	Birth Nation:	Year Arrived:	Have Work Visa		
Please check any of the following that apply (for statistical purposes only – not a qualifier for services):					
Agriculture Employed		Military Service	Branch:	Active	
EI Recipient		Youth (under 30)			
Unemployed Albertan:		Have a Disability (visible or not)			
Employed but considering Self-Employment		Aboriginal/Metis Ancestry			
BUSINESS INFORMATION					
Business Name:			Business Number:		
Business Address is the same as Home Address:					
Business Address:					
City:	Province:	Postal Code:			
Phone: (B)	(C)	(F)			
Email:					
Website:					
Home Based:	New:	Existing:	Business Start Date (dd-mmm-yy):		
Open full-time:	Open part-time:	Not Started:	Chamber of Commerce Member:		
Sole Proprietorship:	Partnership:	Incorporated:	Non-Profit:		
Industry/Sector:					
Agriculture	Finance	Manufacturing	Technology		
Business Services	Fishery	Mining	Tourism		
Communication	Forestry	Oil and Gas	Transportation		
Community Service	Government	Professional Services	Wellness		
Construction	Health Service	Real Estate	Wholesale		
Education	Hospitality	Retail	Other:		
Applicant Loan Needs (in \$):			Potential/Actual # of Jobs Created/Maintained:		

SEE OVER FOR PRIVACY STATEMENT

PRIVACY POLICY

Community Futures Highwood Privacy Statement

Community Futures Highwood is committed to respecting and protecting the personal privacy of our clients. We are committed to complying with the provisions of the *Personal Information Protection Act (PIPA)* and *Freedom of Information and Protection of Privacy (FOIP)*.

We collect information about you and your business or business idea in order to provide you with the Government funded programs and services you have requested. This information is normally used as follows:

- i. To determine if you qualify for any of the services or program assistance
- ii. To analyse the extent of assistance we may be able to provide
- iii. To demonstrate to Government Agencies the need to qualify you for specific assistance
- iv. To assist us in providing the Government with appropriate accumulated targeted data on the services we are providing
- v. To assist in identifying appropriate referral agents
- vi. To use some of the non-financial and non-personal confidential information, with your prior approval, to assist in marketing or referring you to potential employers or to potential customers of your business

Community Futures Highwood:

- Will not collect, use or disclose your personal information for any purposes other than those identified to you, subject to exceptions permitted by law;
- Will make all reasonable efforts to protect the confidentiality of your personal information when doing business internally or externally with other organizations;
- Will make all reasonable efforts to keep your personal information accurate and up-to-date; and
- Will attempt to honour requests you make for access to your personal information or the correction of your personal information under the guidelines of the various Government Privacy Acts.

We do not compile, review or use this information for any other purpose.

Community Futures Highwood acknowledges that safeguarding your personal information is an important responsibility.

CF Highwood Loan Appeal Process

1. An applicant may appeal a loan decision in writing, outlining their reasons for the appeal and or presenting new information that may help the application viability.
2. The written appeal will be directed to the Investment Review Committee (IRC) Chairperson and the General Manager...
 - a. The Chair will convene a Management Review Committee (MRC) meeting to review the information presented by the Client and review the rationale for the original decline decision... or.
 - b. The Chair may send the appeal back to the IRC for reconsideration if the appeal contains materially different information or shows that the initial review was inadequately represented.
3. Should the CFH again reject the proposal and the client requests an independent review of the Board's original and subsequent appeal process, the Chair will provide the client with timely access to a process of external appeal through the Community Futures South Alberta Region's Appeal/Redress Committee.
 - a. The role of the Community Futures South Alberta Region's Appeal/Redress Committee is to provide an independent review of Community Futures Highwood's decision making and internal review processes. However, the Board of Community Futures Highwood maintains all final authority for all decisions.

If you have questions regarding our web site security or privacy policy, please contact us.