

**HAVENTREE MORTGAGE RENEWAL CLASS ACTION SETTLEMENT**  
**CLAIM FORM**

*Vistoli v Haventree Bank, also known as Banque Haventree,*  
Ontario Superior Court of Justice Court File No. CV-20-00651976-00CP

**Private & Confidential**

Please read this Claim Form carefully and complete it in full. Failure to fully complete this Claim Form and/or sign it will result in your Claim being rejected. Once completed and signed, submit this Claim Form to the Claims Administrator on or before May 16, 2025.

**INSTRUCTIONS**

This Claim Form is for Settlement Class Members who wish to claim a Settlement Payment under the Settlement Agreement. "**Settlement Class Members**" means all persons situated in Canada (including their heirs, estates, executors, trustees or personal representatives) whose mortgages held by Haventree Bank (also known as Banque Haventree) were involuntarily and/or automatically renewed, and who paid any amount of interest, costs, and fees as a result.

All Claim Forms will be reviewed and assessed by the Claims Administrator appointed by the Court. Once you have completed it, send this Claim Form to the Claims Administrator.

**CLAIMS DEADLINE: All Claim Forms must be sent/postmarked on or before May 16, 2025. After that date, it will be too late for your Claim to be considered.**

Your Claim Form is confidential and will only be used for the claims process. Keep a copy of your completed Claim Form for your records.

**There are two ways to submit this Claim Form to the Claims Administrator:**

- 1. by email to [info@haventreemortgagerenewalsettlement.ca](mailto:info@haventreemortgagerenewalsettlement.ca); or**
- 2. by mail sent to the following address:**

**Haventree Mortgage Renewal Settlement Claims Administrator  
c/o Epiq Class Action Services Canada Inc.  
P.O. Box 507 STN B  
Ottawa, ON K1P 5P6**

If you submit your Claim by email, keep the email. If you submit your Claim by mail, write down the date you put the Claim Form in the mailbox. Keep that date with your copy.

Ask for help if you do not understand this Claim Form. You can ask someone that you trust for help. You can also email the Claims Administrator ([info@haventreemortgagerenewalsettlement.ca](mailto:info@haventreemortgagerenewalsettlement.ca)) or reach out to Class Counsel, Landy Marr Kats LLP at [haventreebankclassaction@lmklawyers.com](mailto:haventreebankclassaction@lmklawyers.com) or 416-221-9343 ext. 250 or McKenzie Lake Lawyers LLP at [christina.noble@mckenzielake.com](mailto:christina.noble@mckenzielake.com) or 1-844-672-5666.

If the Claims Administrator has any questions regarding your Claim after it is submitted, you will be notified by email or mail. You must respond promptly to any request by the Claims Administrator for additional information. If you do not respond, the Claims Administrator will be unable to process your Claim and you will not get paid.

You must notify the Claims Administrator if your address or contact information changes after you submit this Claim Form. If you do not, you may not receive your Settlement Payment.

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**1. CLAIMANT INFORMATION**

Provide the following information about the person submitting this Claim, or, if applicable, on whose behalf you are submitting this Claim. *Fields marked with \* are mandatory.*

You must notify the Claims Administrator if this information changes after you submit this Claim Form.

*Last Name:		*First Name:		*Middle Initial:	
*Current Address:				Apt. Number:	
*City:	*Province:	*Postal Code:	*Country:		
*Phone Number:			Email Address (if available):		

**2. INFORMATION ABOUT YOUR HAVENTREE MORTGAGE AGREEMENT**

Please provide the following information about your mortgage held by Haventree Bank:

*Full Name (at the time Settlement Class Member entered into mortgage agreement with Haventree Bank, if different than above):		<input type="checkbox"/> Same as above.
*Residential Address Subject to the Mortgage Agreement:		Apt. Number:
*City:	*Province:	*Postal Code:
*Mortgage Number:	Borrower Type (check one): <input type="checkbox"/> Primary Borrower <input type="checkbox"/> Co-Borrower	
* <b>Written Confirmation</b> – Check <u>ONLY</u> the applicable box below:		
<input type="checkbox"/> I am a person situated in Canada whose mortgage held by Haventree Bank was involuntarily and/or automatically renewed, and I paid an amount of interest, costs, and fees as a result.		
<input type="checkbox"/> I am the representative of the above-identified Settlement Class Member whose mortgage held by Haventree Bank was involuntarily and/or automatically renewed, and who paid an amount of interest, costs, and fees as a result. <u>Note: For this Claim Form to be valid, you must attach a copy of the Certificate of Appointment of Estate Trustee, Continuing Power of Attorney for Property, or other document establishing your authority to act on the Settlement Class Member’s behalf.</u>		

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- 3. REPRESENTATIVE IDENTIFICATION** – only complete this section if you are submitting this Claim Form on behalf of a Settlement Class Member who is deceased or for another reason.

If you are submitting this Claim Form as a representative on behalf of a Settlement Class Member, provide the following information about yourself and **attach a copy of the Certificate of Appointment of Estate Trustee, Continuing Power of Attorney for Property, or other document establishing your authority to act on this person's behalf:**

Representative's Last Name:		Representative's First Name:	
Representative's Street Address:			Apt Number:
City:	Province/Territory:	Postal Code:	
Representative's Phone Number:		Representative's Email Address:	
Representative's Law Firm Name (if applicable):			

Please select a box below to explain why you have the authority to submit this Claim Form on the Settlement Class Member's behalf:	
<input type="checkbox"/>	Class Member is incapacitated/incompetent
<input type="checkbox"/>	Class Member is deceased
	Date of Death (DD/MM/YYYY):
<input type="checkbox"/>	Other
	Please Describe:

<input type="checkbox"/>	<b>I have attached a copy of the Certificate of Appointment of Estate Trustee, Continuing Power of Attorney for Property, or other document establishing my authority to act on the Settlement Class Member's behalf.</b>
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**4. PAYMENT INFORMATION**

Settlement Class Members with Approved Claims will receive their compensation payment by cheque. If your Claim is approved, the payment will be sent to the address specified in section 1 of this Claim Form. Payment to Settlement Class Members with Approved Claims shall not exceed (but may be less than) CAD \$5,000 per mortgage.

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**5. PRIVACY STATEMENT**

All personal information provided by or on behalf of the Settlement Class Member to the Claims Administrator or its agent(s) will be handled in accordance with applicable privacy laws. Such information will be collected, used, and retained solely for the purposes of administering the Settlement Agreement. The information provided will be treated as private and confidential and will not be disclosed without the express written consent of the Settlement Class Member or his/her/their counsel, except in accordance with the Settlement Agreement, Settlement Approval Order, and/or other orders of the Ontario Superior Court of Justice.

**6. DECLARATION**

By submitting a Claim in this Settlement, I hereby acknowledge that:

- (a) I am a member of the Settlement Class;
- (b) I am bound by and subject to the terms of the Settlement Agreement and the Settlement Approval Order, including the releases set forth therein; and
- (c) If I have issued and served on Haventree Bank, or other related entities or individuals, my own individual lawsuit, proceeding, action, or application about the legal issues in this case ("Individual Claim"), and did not opt out of the Settlement Class, my Individual Claim may be dismissed with prejudice and without costs as provided in the Settlement Agreement.

**By signing below, I declare under penalty of perjury that I am a Settlement Class Member or a representative of a Settlement Class Member as disclosed in section 3 above, and that the information provided and submitted in this Claim Form is true and correct to the best of my knowledge. I understand that this Claim Form may be subject to audit, verification, and review by the Claims Administrator, the Defendant, and/or Class Counsel. I also understand that if the information contained in this Claim Form is believed or found to be fraudulent, I will not receive any payment. I agree to participate in the Settlement.**

\_\_\_\_\_  
Date (DD/MM/YYYY)

\_\_\_\_\_  
Signature of Settlement Class Member  
(or an authorized Representative)

\_\_\_\_\_  
Printed Name of Settlement Class Member  
(or an authorized Representative)

**REMINDER CHECKLIST**

Before you submit your Claim Form, please ensure you have completed the following:

- I have reviewed this Claim Form for completeness and correctness.
- I have signed and dated this Claim Form.
- I have given the written confirmation in section 2.
- I have attached the representative document(s) requested in section 3, if applicable.
- I have made a copy and kept a copy of this Claim Form for my records.

Should you require assistance with your Claim Form, please contact:

<b>Claims Administrator</b>
<p><b>Haventree Mortgage Renewal Settlement Claims Administrator</b> <b>c/o Epiq Class Action Services Canada Inc.</b> P.O. Box 507 STN B Ottawa, ON K1P 5P6 Email: <a href="mailto:info@haventreemortgagerenewalsettlement.ca">info@haventreemortgagerenewalsettlement.ca</a> Website: <a href="https://haventreemortgagerenewalsettlement.ca/">https://haventreemortgagerenewalsettlement.ca/</a></p>

<b>Class Counsel</b>	
<p><b>Landy Marr Kats LLP</b> 2 Sheppard Ave E, Suite 900 Toronto, ON M2N 5Y7 Tel: 416-221-9343 ext. 250 Email: <a href="mailto:haventreebankclassaction@lmklawyers.com">haventreebankclassaction@lmklawyers.com</a> Website: <a href="https://thetorontolawyers.ca/classactions/haventree-bank/">https://thetorontolawyers.ca/classactions/haventree-bank/</a></p>	<p><b>McKenzie Lake Lawyers LLP</b> 140 Fullarton Street, Suite 1800 London, ON N6A 5P2 Tel: 1-844-672-5666 Email: <a href="mailto:christina.noble@mckenzielake.com">christina.noble@mckenzielake.com</a> Website: <a href="https://www.mckenzielake.com/haventree-automatic-mortgage-agreement-renewals/">https://www.mckenzielake.com/haventree-automatic-mortgage-agreement-renewals/</a></p>