

# WE WOULD LIKE TO GET TO KNOW YOU BETTER

## To Serve You Better

4202 Navarre Ave. Oregon, OH 43616 \* 419-698-2962 bayareacu.com



### PERSONAL

Date \_\_\_\_\_  Member since \_\_\_\_\_  New Member

Name \_\_\_\_\_ DOB \_\_\_\_\_

Spouse/Partner Name \_\_\_\_\_ DOB \_\_\_\_\_

Child Name \_\_\_\_\_ DOB \_\_\_\_\_

Child Name \_\_\_\_\_ DOB \_\_\_\_\_

Child Name \_\_\_\_\_ DOB \_\_\_\_\_

Child Name \_\_\_\_\_ DOB \_\_\_\_\_

Child Name \_\_\_\_\_ DOB \_\_\_\_\_

Family who are Members \_\_\_\_\_

Best way to contact you: Ph \_\_\_\_\_

Mobile/Text \_\_\_\_\_ email \_\_\_\_\_

### PRIORITIES

Rank the importance of the following items:      Low.....High

Finding more "room" in your budget	1	2	3	4	5
Establishing emergency savings	1	2	3	4	5
Saving for children's education	1	2	3	4	5
Retirement planning	1	2	3	4	5
Purchasing/building/remodeling a home	1	2	3	4	5
Fixing or building credit	1	2	3	4	5

Other major event or purchase:  
\_\_\_\_\_

### ACCOUNTS

Do you currently \_\_\_ Rent \_\_\_ Own \_\_\_ Other \_\_\_\_\_

If you own, what is the value of your home? \$ \_\_\_\_\_

**We currently have the following accounts.**

Account	Rate	Location
Mortgage	_____%	_____
Home Equity	_____%	_____
Auto Loan	_____%	_____
Checking	_____%	_____
IRA's	_____%	_____

### CREDIT REPORT

In consideration of your financial health, the credit union may request and use reports from outside credit reporting agencies. The information is for internal use only and will not be shared with outside vendors.

### EMPLOYMENT

\_\_\_\_\_

Employer

\_\_\_\_\_

Position/Title

\_\_\_\_\_

Length of Employment

\_\_\_\_\_

Spouse/Other Employer

Signature \_\_\_\_\_ Date \_\_\_\_\_