

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 _____

Spouse/Partner Name _____

Child Name/Age _____

Child Name/Age _____

Child Name/Age _____

Family who are Members _____

Best way to contact you: Ph _____ Mobile/Text _____

Email _____

How did you hear about us? Location _____ Advertisement _____ Loan _____ Other _____
Member Referral _____

PRIORITIES

What are your future goals (check all that apply):

- Finding more "room" in your budget
- Establishing emergency savings
- Saving for children's education
- Retirement planning
- Purchasing/building/remodeling a home
- Fixing or building credit
- Other _____

What services are you interested in (check all that apply):

- Share(Savings)
- Spending (Checking)
- Debit Card
- Retirement Account (IRA)
- Online Services
- Loan (Auto/Personal/Rec)
- Mortgage
- Home Equity/HELOC
- Credit Card
- Other _____

EMPLOYMENT

Employer

Position/Title

Length of Employment

Spouse/Other Employer

ACCOUNTS

Do you currently ___ Rent ___ Own ___ Other _____

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

We currently have the following accounts:

<u>Account</u>	<u>Rate</u>	<u>Location</u>
Mortgage	_____%	_____
Home Equity	_____%	_____
Auto Loan	_____%	_____
Checking	_____%	_____
IRA	_____%	_____
Certificate	_____%	_____
Money Market	_____%	_____