



Citizens Community Credit Union

Your Financial Friend

We'd Like To Get To Know You To Better Serve You

OUR MEMBER PROMISE

At Citizens Community Credit Union, we promise to simplify your financial life so you may focus on your day to day activities. We promise to work in your best interest to provide personalized financial solutions so you may achieve financial success! We promise to always offer fair and competitive products and services, and we promise to support the communities we serve.

EMPLOYMENT

Employer _____

Position/Title _____

Length of Employment _____

Spouse/Other Employer _____

Yearly Household Income

- Under \$20,000
- \$20,000-\$30,000
- \$30,000-\$60,000
- \$60,000-\$100,000
- Over \$100,000

1-800-238-3298

www.citizens-cu.com

PERSONAL

Date _____ Member Since _____ New Member _____

Name _____ DOB _____

Spouse/Other Name _____ DOB _____

Child Name _____ DOB _____

Child Name _____ DOB _____

Child Name _____ DOB _____

Child Name _____ DOB _____

Best way to contact you: Phone _____ Email _____

PRIORITIES

Knowing your priorities will give us a better understanding of what is important to you. We can then suggest solutions or give you information to help you reach your financial goals.

Rank the importance of the following items: **LOW 12.....3.....4..... 5 HIGH**

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

Next major event or purchase _____

ACCOUNTS

Do you currently Rent Own Other _____

I/We currently have the following accounts:

| Account | Rate | Financed at |
|-------------|---------|-------------|
| Mortgage | _____ % | _____ |
| Home Equity | _____ % | _____ |
| Auto Loan | _____ % | _____ |
| Checking | _____ % | _____ |
| IRAs | _____ % | _____ |
| CDs | _____ % | _____ |

CREDIT REPORT

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

Signature _____

Please complete this form, print and bring into your nearest CCCU branch to review with an associate.