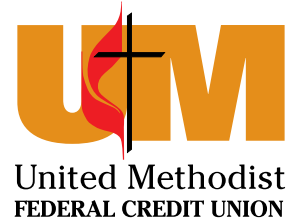


At United Methodist Federal Credit Union, you can depend on us to simplify your financial life, partner with you to achieve your financial goals, and to always work in your best interests. At United Methodist Federal Credit Union, it's always about you!

Getting To Know You To Serve YOU Better



EMPLOYMENT

Employer _____

Position/Title _____

Length of Employment _____

Spouse/Other Employer _____

Household Income _____

HOW DID YOU HEAR ABOUT US?

- Newspaper
- Family/Friends
- Internet
- Branch Location
- My Employer
- UMFCU Employee
- Member
- Church
- Other

UMFCU and its representatives are not licensed financial advisors and may not give legal or tax advice. Any discussion herein or related to this document is for general information purposes. You should consult with and rely on your own independent legal, financial and tax advisors regarding your particular set of facts and circumstances.

PERSONAL

Date ____/____/____ Member since ____ New Member

Name _____ DOB ____/____/____

Spouse/Other Name _____

of Kids ____ Name(s) _____

Preferred method to contact you:

Phone _____ Email _____

PRIORITIES

Having a better understanding of your priorities will give us a better understanding of what is important to you. We will help you achieve your financial goals!

RANK THE IMPORTANCE OF THE FOLLOWING ITEMS:	LOW.....				HIGH
Finding more "money" 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 _____	1	2	3	4	5

ACCOUNTS

Do you currently Rent \$_____ Own \$_____ Lease \$_____ Other \$_____

Monthly payment: _____

I/We currently have the following accounts:

ACCOUNT	RATE	LOCATION	BALANCE(S)
Mortgage	_____%	_____	_____
Home Equity	_____%	_____	_____
Auto Loan	_____%	_____	_____
Checking	_____%	_____	_____
IRAs	_____%	_____	_____
CDs	_____%	_____	_____
Credit Cards	_____%	_____	_____

CREDIT REPORT

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

Your score _____ Date _____

FORM UPDATED: _____ FORM UPDATED: _____ FORM UPDATED: _____

Date: _____

Employee Comments _____

Date: _____

Employee Comments _____

Recommendations _____