

New Credit Union Information Sheet

Credit Union Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

Web address: _____

Number of Branches (list separately)

Main Credit Union Contact

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Marketing Contact:

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

IT Contact:

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Name of Credit Union Program (only if opeting for a privte label)

Reports and Updates

Send Reports to:

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Updates to:

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Note: Buyer leads should be submitted to Client First Realty after your member has been pre-qualified for a loan. A Seller lead should be submitted immediately.

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

It is important for the Client First Realty Representative to train your Branch Managers and Employees on the Benefits and importance of the Smart Moves Program. Who should Client First Realty contact to arrange a Branch Managers Meeting?

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

Client First Realty will be providing Marketing/Merchandising material. Who should CFR contact to review and approve the marketing materials?

Name: _____ Title: _____

Phone: _____ ext. _____ Fax: _____ Cell: _____

Email: _____

When you return this form, please include a list of Branch Operations showing the Branch managers name and contact information as well as the address of each Branch.