

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



At Classic Federal Credit Union, you can count on us to simplify your financial life, always work in your best interest and partner with you to achieve your financial goals.

Please take a moment to help us get to know you and your family better. This will help us to provide you with the best possible service and products.

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

## Personal

Date \_\_\_/\_\_\_/\_\_\_      Member Since \_\_\_\_\_      New Member

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

Spouse/Other Name \_\_\_\_\_      DOB \_\_\_/\_\_\_/\_\_\_

Child 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 products or give you information to help you reach your financial goals.

Rate from 1-6  
(1 being high priority  
6 being low).

Rank the importance of the following items:    1    2    3    4    5    6

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 major event or purchase

## Accounts

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

I/We currently have the following accounts:

Account	Rate	Location
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 outside credit reporting agencies. The information is for internal use only and will not be shared with outside vendors.

Signature \_\_\_\_\_