



Please take a moment to help us get to know you better. We look forward to finding the right financial solution for you.

PERSONAL

Name _____ DOB ____/____/____

Spouse/Partner Name _____ DOB ____/____/____

Child's Name _____ DOB ____/____/____

Child's Name _____ DOB ____/____/____

Child's Name _____ DOB ____/____/____

Phone _____ E-mail _____

How did you hear about us? _____

PRIORITIES

Knowing your priorities will give us a better understanding of what is important to you. We can then provide you with information to meet your financial goals.

Please rank the importance for the following:

Low.....High

Comments?

Table with 4 columns: Item, Low (1-5), High (1-5), and Comments. Rows include: Finding more "room" in your budget, Establishing emergency savings, Saving for children's education, Retirement planning, Purchasing/building/remodeling a home, Buying or trading a car, Other major event or purchase.

ACCOUNTS

Do you currently Rent _____ Own _____

I/We currently have the following accounts:

Table with 3 columns: Account, Rate, Financial Institution. Rows include: Mortgage, Home Equity, Auto Loan, Checking, IRA's, Other.

EMPLOYMENT

Employer _____

Position/Title _____

Length of Employment _____

Spouse/Partner Employer _____

Protecting your personal information is a high priority for everyone at Granite Hills Credit Union. We only collect personal information that is deemed necessary to verify who you are, conduct your financial transactions, and satisfy certain regulatory requirements. Your information will not be "shared with" other companies and will never be sold.

You have my permission to pull my credit report.

Signature _____ Date _____

Social Security Number _____