

# Take the Challenge

To Be Financially Successful.

## Westerly Community Credit Union

Helping our members achieve financial success!



*Life is a challenge and all of us at WCCU are here to help.*

*Please take the time to tell us what is important to you, so we can help you achieve financial success.*

### EMPLOYMENT

Employer

Position/Title

Length of Employment

Spouse/Other Employer

Yearly Household Income:

- Under \$30,000
- \$30,000-\$60,000
- \$60,000-\$100,000
- \$100,000-\$150,000
- over \$150,000

### PERSONAL

Date \_\_\_/\_\_\_/\_\_\_

Member Since \_\_\_\_\_

New Member

Name \_\_\_\_\_

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

Spouse/Partner \_\_\_\_\_

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

Child Name \_\_\_\_\_

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

Child Name \_\_\_\_\_

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

Child Name \_\_\_\_\_

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

Child Name \_\_\_\_\_

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

Best way to contact you: Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### PRIORITIES

**Rank the importance of the following items:**

**Low.....High**

Finding more "room" in my budget	1	2	3	4	5
Establishing emergency savings	1	2	3	4	5
Savings 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: _____					

### ACCOUNTS

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

If I own, value: \$ \_\_\_\_\_

I/We currently have the following accounts.

<b>Account</b>	<b>Rate</b>	<b>Balance</b>	<b>Location</b>
Mortgage	_____%	\$ _____	_____
Home Equity	_____%	\$ _____	_____
Auto Loan	_____%	\$ _____	_____
Checking	_____%	\$ _____	_____
IRAs	_____%	\$ _____	_____
CDs	_____%	\$ _____	_____
Money Market	_____%	\$ _____	_____

Optional Comments: \_\_\_\_\_

You authorize us to check financial information data, which may include the Credit Union obtaining a credit report or credit score from any consumer reporting agency to verify your eligibility for any accounts and services we offer or you may request.

Signature \_\_\_\_\_