



Planning for Your CU*BASE Credit Union Merger

General Information Questionnaire

7/03

Please complete the following questionnaire to assist CU*Answers in planning for your upcoming merger.

Merged (New) Credit Union Name and Address	
Please list addresses for all other offices/branches for the Credit Union to be merged. (Attach an additional sheet if necessary.)	
Which location(s) will remain open after the merger?	
How many employees will be retained from the merged Credit Union?	
How many members does the Credit Union to be merged currently have?	
What will the new credit union's days and hours operation be (if different from your Credit Union's current hours)?	
What is the current data processing source for the Credit Union to be merged? Are they currently processed on-line or in-house?	
Has the current data processor been notified <u>in writing</u> of the coming change?	
Please list a contact name and telephone number for the current data processor.	
What are your expected education and training needs from CU*Answers?	
Other Comments	