

Sample Merger Letter

Date

To our valued credit union client:

I know you are excited and anxious to move ahead your planned merger and converting XYZ Credit Union to CU*BASE. We are pleased to assist you with this process.

As usual, the availability for scheduling CU*Answers conversion resources is tight. Thus, it is important to firm up a conversion date as soon as possible. Depending upon timeframe desired, there may only be limited time available on a first-come, first-served basis.

I am enclosing merger pricing guidelines as well as questionnaires requesting information for the credit union being merged. This information will be very helpful in the conversion planning process.

Please review this information and fax or mail the General Information Questionnaire and Third Party Vendor Listing to me as soon as possible. CU*Answers' Programming team needs to get an initial peek at the scope of the project and determine any programming and testing requirements they will need to consider.

Please give me a call with questions. I look forward to talking with you soon.

Sincerely,

Scott L. Collins
EVP of Sales and Marketplace Development
CU*Answers

SLC:DM

enclosures: *Planning for Your CU*BASE Credit Union Merger: General Information Questionnaire*
*Planning for Your CU*BASE Credit Union Merger: Third Party Vendor Listing*
*Planning for Your CU*BASE Credit Union Merger: Merger Pricing Guidelines*