

Credit Union: _____
Contact Name: _____
Email: _____
Telephone: _____
Data Processor: _____



Request for Proposal

Laser Forms Pre-Printed Forms

You can submit your request online, email it to your Conmar Rep, fax it or mail it. Your proposal for the forms selected below will be emailed to the address you provide. Proposals for pre-printed forms may require additional information. If needed, a Rep will contact you before a Proposal is sent.

Below is a list of our core products. Our forms library is quite large and as such we cannot show every form we offer. If you need a quote for a form not listed please use the Other Section.

MEMBER SERVICES/ACCOUNT OPENING

How many new members do you sign up annually? _____

Membership Application (account card)

One multi-page form that combines all your disclosures into one Master Agreement

Master Membership Agreement (includes all disclosures listed in the individual section)

-OR-

One form for each individual disclosure

Account Agreement

Funds Availability Disclosure - Reg CC

Electronic Funds Transfer Agreement - Reg E

Truth in Savings

Types of Disclosures: _____

(example: Savings, Checking, Money Market)

Truth in Savings Rate and Fee Schedule

Privacy Policy

ACCOUNT MAINTENANCE FORMS

Account Receipt Stop Payment Deposit Hold Wire Transfer Request

Wire Transfer Agreement Affidavit of Forgery Renewal Notices Maturity Notices ACH Authorization

Safe Deposit Application/Agreement Other: _____

CONSUMER LENDING

How many Consumer Loans do you approve annually?: _____

What type of Consumer Lending do you offer?

Closed End Only (collateralized loans, autos, motorcycles, boats, RV's, etc.)

Closed End with a single Open End Line of Credit Product (personal line of credit, overdraft line of credit, etc.)

Multi Feature Lending (MFL) – Single Advance (Blended Open/Closed End Plan)

Military Lending Act Addendum to Loan (MLA)

Credit Cards – Visa MasterCard Application and Solicitation Agreement and Opening Disclosure

Printed Application and Agreement -OR- Laser generated from your DP/LOS system

How many new credit card accounts do you approve annually?: _____

Risk Based Pricing Notices

General Notice No Score Notice Review Notice Credit Score Exception-Consumer

General Notice w/Credit Score Info Review Notice w/Credit Score Info Credit Score Exception-Real Estate

Smart Check (Autodraft) for Pre-Approved Loans

MORTGAGE LENDING

What type of Mortgage Lending do you offer?

Open End Home Equity Line of Credit – HELOC

Variable Rate Fixed Rate

How many loans do you close annually?: _____

What states do you lend in?: _____

Closed End 2nd Mortgage/Refinance

Fixed Rate Adjustable Rate Adjustable Payment Adjustable Rate & Payment

How many loans do you close annually?: _____

What states do you lend in?: _____

Closed End Home Loan 1st Mortgage (purchase money)

Fixed Rate Adjustable Rate Adjustable Payment Adjustable Rate & Payment

How many loans do you close annually?: _____

What states do you lend in?: _____

ANCILLARY TRID FORMS

Additional Applicants Closing Disclosure Additional Applicants Loan Estimate Refi Escrow Closing Notice

Pre Loan Estimate Service Provide List – Can Shop For Service Provider List – Cannot Shop For

OTHER

Describe _____

