

**Member Services**

- ✓ Account Opening
- ✓ Electronic Services
- ✓ Funds Availability
- ✓ Truth-in-Savings
- ✓ Privacy Policy
- ✓ Account Maintenance

**Consumer Lending**

- ✓ Open End
- ✓ Closed End
- ✓ Multi Feature OE/CE
- ✓ Credit Cards
- ✓ Smart Checks

**Mortgage Lending**

- ✓ HELOC
- ✓ CE Home Equity
- ✓ CE Refinance
- ✓ 1st Mortgage
- ✓ Texas HELOC
- ✓ Texas 2nd Lien

**Business Membership**

- ✓ Account Opening
- ✓ Account Maintenance

**Commercial Lending**

- ✓ Closed End Installment
- ✓ OE Line of Credit
- ✓ Credit Cards

**Pre-Printed Forms**

- ✓ Brochures to Checks
- ✓ Envelopes to Receipts
- ✓ Multi-part NCR
- ✓ Cut sheet

**Compliance**

- ✓ State and Federal
- ✓ Compliance Warranty

**Corporate Office**

665 Hwy 74 South, Suite 200  
 Peachtree City, GA 30269  
 T: 800.227.4931  
 T: 770.487.3883  
 F: 770.487.3366  
 E: sales@conmarsystems.com  
 W: conmarsystems.com

**Client Service Support**

Angela Bowers  
 abowers@conmarsystems.com

Traci Hantz  
 thanzt@conmarsystems.com

**Southwest Regional Office**

Kathy Macias  
 512.736.1789  
 kmacias@conmarsystems.com

**Western Regional Office**

Mike Smith  
 760.244.5823  
 msmith@conmarsystems.com

**ACCOUNT MAINTENANCE and SUPPORT FORMS**

Below is a general list of traditional maintenance and support documents

**Member Services**

- Multi-Purpose Account Receipt
- Order for Stop Payment
- Affidavit of Forgery
- Wire Transfer Request
- Renewal Notice (certificate accounts)
- Safe Deposit Box Rental Agreement
- ACH Authorization (Credit and/or Debit)
- Address/Name Change
- Consent to Overdraft Fees

- Certificate Receipt
- Deposit Hold Notice
- Adverse Action (Deposit Accounts Only)
- Wire Transfer Request/Agreement
- Maturity Notice (certificate accounts)
- Cardholder Agreement ATM/Check Card
- Affidavit of Unauthorized Use Debit Card
- Direct Deposit Sign Up

**Real Estate**

- FNME 1003 Long Application
- Verification of Deposit
- Taxpayer Authorization and Consent
- Error Response Request
- Escrow Closing Notice
- Delinquency Notice
- IRS Tax Form 4506-T
- Service Provider List - Can Shop For
- Service Provider List - Cannot Ship Form
- Additional Applicants - Loan Estimate-Refi
- Mortgage Modification FR
- PMI Initial Notice
- Home Loan Tool Kit (1<sup>st</sup> mtg only)

- ECOA Notice
- Verification of Employment
- Credit Score Exception Notice - Real Estate 1-4
- Information Response Request
- Escrow Notice
- Borrowers Certification
- IRS Tax Form W-9
- Notice of Requirement to Provide Insurance
- Additional Applicants - Loan Estimate
- Additional Applicants - Closing Disclosure
- Mortgage Modification ARM
- PMI Annual Notice
- CHARM Booklet (ARM)

There are many different maintenance and support forms and notices in use by credit unions. If you don't see a form listed above we can search our forms library to try and locate it. We can also convert internal forms into electronic form compatible with your data processor/LOS system. If you have an internal form you need created, let us know and we'll be happy get you an estimate to have it setup to your system specifications.