



Member Number: \_\_\_\_\_

Today's Date: \_\_\_\_\_

### Membership Application

To be completed by applicant:

1. What is your connection to the community?

\_\_\_\_\_ Live \_\_\_\_\_ Volunteer \_\_\_\_\_ Work \_\_\_\_\_ Study \_\_\_\_\_ Other \_\_\_\_\_

2. Applicant name: \_\_\_\_\_  
Last Name First Name MI

3. Address: \_\_\_\_\_  
Street Apt # City State Zip Code

4. Mailing Address if different: \_\_\_\_\_  
Street Apt # City State Zip Code

5. SSN or ITIN: \_\_\_\_\_ 6. Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Month / Day / Year

If this is a joint account, please answer questions from 7 to 9. Otherwise go to question 10.

7. Co-Applicant name: \_\_\_\_\_  
Last Name First Name MI

8. SSN or ITIN: \_\_\_\_\_ 9. Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Month / Day / Year

10. Phone: \_\_\_\_\_ 11. Cell: \_\_\_\_\_

12. Gender: Female / Male 13. Driver's License # and State: \_\_\_\_\_

14. E-mail address: \_\_\_\_\_

Please fill out information about each employer:

15. Name of employer 1: \_\_\_\_\_

16. Phone Number 1: \_\_\_\_\_ 17. Hire Date 1: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Month / Day / Year

18. Address 1: \_\_\_\_\_  
Street City State Zip Code

19. Name of employer 2: \_\_\_\_\_

20. Phone Number 2: \_\_\_\_\_ 21. Hire Date 2: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Month / Day / Year

22. Address 2: \_\_\_\_\_  
Street City State Zip Code



My signature below indicates that I have received the Membership Agreement, that I would like to be accepted as a member of Neighborhood Trust Federal Credit Union and, if so accepted will abide by the rules and regulations of this institution.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Joint Signature \_\_\_\_\_ Date \_\_\_\_\_



Member Number: \_\_\_\_\_

We appreciate taking the time to answer the *optional* questions listed below. Please note that this information is used exclusively by NTFCU to better serve you and our community.

23. What is your connection to the community?:

\_\_\_\_\_ Live \_\_\_\_\_ Volunteer \_\_\_\_\_ Work \_\_\_\_\_ Study \_\_\_\_\_ Other \_\_\_\_\_

24. How did you hear about NT?

\_\_\_\_\_ Check Cashing Program \_\_\_\_\_ Walked by the branch  
\_\_\_\_\_ Child in school banking \_\_\_\_\_ Ads/flyers  
\_\_\_\_\_ Financial Education Program \_\_\_\_\_ Employer  
\_\_\_\_\_ Friend or family member \_\_\_\_\_ Other \_\_\_\_\_

25. Were you born in the US? Yes / No

26. Ethnicity and/or country of origin:

\_\_\_\_\_ Dominican Republic \_\_\_\_\_ Ecuador \_\_\_\_\_ Puerto Rico \_\_\_\_\_ Colombia  
\_\_\_\_\_ Native American \_\_\_\_\_ Caucasian \_\_\_\_\_ African American \_\_\_\_\_ Asian  
Other Latin American country \_\_\_\_\_ Other \_\_\_\_\_

27. What is your approximate Annual Income?

\_\_\_\_\_ Less than \$10,000 \_\_\_\_\_ \$10,000-20,000 \_\_\_\_\_ \$21,000-\$35,000  
\_\_\_\_\_ \$36,000-50,000 \_\_\_\_\_ \$51,000-65,000 \_\_\_\_\_ above \$65,000

28. Are you self-employed? Yes / No What kind of work do you do? \_\_\_\_\_

29. What are your financial goals? Mark all that apply; circle the primary goal.

\_\_\_ Homeownership \_\_\_ Education \_\_\_ Business \_\_\_ Establish credit  
\_\_\_ Consolidate debt \_\_\_ Retirement \_\_\_ Save for the future  
Other \_\_\_\_\_

30. What are the obstacles to reaching your financial goals?

\_\_\_ Not enough Income \_\_\_\_\_ No credit history \_\_\_\_\_ Debt  
\_\_\_ Lack of Knowledge of financial services \_\_\_\_\_ Lack of Access to financial services  
\_\_\_ Immigration Status \_\_\_\_\_ Other \_\_\_\_\_

31. Have you ever had a bank account in the USA?

\_\_\_\_\_ I have one now \_\_\_\_\_ I never had a bank Account  
\_\_\_\_\_ I had one in the past \_\_\_\_\_ I had one in my home country

What kind of account? \_\_\_\_\_



Member Number: \_\_\_\_\_

32. Which of the following do you currently use on a regular basis?

\_\_\_ Cash checks at check cashing stores      \_\_\_ Pay bills at check cashing stores  
\_\_\_ Buy money orders

33. Where do you save?

\_\_\_ Savings Account    \_\_\_ At home    \_\_\_ Sociedad/SAN    Other \_\_\_\_\_

34. For what do you save? (Mark all that apply)

\_\_\_ Buy a House    \_\_\_ Start a Business    \_\_\_ Emergency    \_\_\_ Vacation    \_\_\_ Education  
\_\_\_ Retirement    \_\_\_ Visit your country    \_\_\_ Bring family from your country  
Other \_\_\_\_\_

36. Who do you borrow money from? (Please check all that apply.)

\_\_\_ Loan from bank    \_\_\_ Loan from credit union    \_\_\_ Mortgage  
\_\_\_ Loan from friend/family    \_\_\_ Loan Shark    \_\_\_ Credit card/s  
\_\_\_ Sociedad/SAN    \_\_\_ Never borrowed    Other \_\_\_\_\_

37. For what did you borrow /are you borrowing? (Check all that apply.)

\_\_\_ Business    \_\_\_ Emergency    \_\_\_ Vacation    \_\_\_ Education  
\_\_\_ Buy House/Property    \_\_\_ Purchase Household Asset    \_\_\_ Buy Car  
Other \_\_\_\_\_

38. Do you know your credit history/rating? Yes / No

If referred by a current member of the Credit Union, please provide name: \_\_\_\_\_

# Thank You!

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To be completed by Neighborhood Trust staff:

Type of Service:

\_\_\_ Share Account                      \_\_\_ Loan (Circle: Business / Personal / Secured / Mortgage)  
\_\_\_ Draft Account                      \_\_\_ Checks                      O/D Protection \_\_\_ Yes \_\_\_ No

Joint Status: \_\_\_ Yes \_\_\_ No                      SS# documented: \_\_\_ Yes \_\_\_ No

\_\_\_ ATM card                                      ATM ID 641524 \_\_\_\_\_

Pin Offset #: \_\_\_\_\_

Data entered into Compushare:

Data entered into Access:

Opened by: \_\_\_\_\_

Entered by: \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_