



For more information, please contact:  
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(715) 235-3403 ext. 7724 | Fax: (715) 232-4990

Federally insured by NCUA

## Business/Organization Information Form

Please complete the following information, save the form and email it to [lausman@westconsinu.org](mailto:lausman@westconsinu.org). Thank you!

Today's date	Business/Organization primary business/service
Business/Organization name	Current number of employees
Address	Do you offer electronic payroll Direct Deposit to your employees? Yes / No
City State Zip	Do you offer paper payroll checks to your employees? Yes / No
Business/Organization web address	

Name of the WESTconsin Credit Union representative who referred you to the Partnership Program

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Business/Organization **Primary** contact name/title

Phone number

Fax number

Email address

Birthday (*simply to acknowledge your day!*):

Business/Organization **Owner/Managers** name

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Areas of participation/events that you will be partnering with WESTconsin Credit Union.

Please select a minimum of **four** from the following activities:

Promote WESTconsin's financial wellness web page and blog to employees/clients

WESTconsin annual participation in your wellness, benefit or safety fair

Financial wellness benefit tools for employee orientations

Have WESTconsin as your HSA (Health Savings Account) administrator

Forward emails for financial wellness events to employees

Have a business loan with WESTconsin Credit Union

Brochure rack in break room or in retail area

Annual co-sponsorship community event with WESTconsin

Promote WESTconsin wellness information on your website/newsletter or flyers

Have your Merchant Card Program through WESTconsin

Other, please list. (as agreed with your WESTconsin Credit Union representative)

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WESTconsin sponsored Kidz Credit Union, School Savings and High School Credit Union automatically qualifies as a Business Partner. This will also automatically include classroom presenters.

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Please indicate other areas of interest that you feel may benefit your company and/or employees/clients:

401(k), college funds and insurance & investment services

Business Services such as loans, savings/checking/debit, HSA debit/checking accounts, credit accounts or Merchant Card program

Real estate loan assistance

WESTconsin Realty LLC home buying and selling services