



For more information, please contact your local WESTconsin Credit Union Office Vice President or Lori Ausman, Director—Business Services and Development (715) 235-3403 ext. 7125 | Fax: (715) 232-6933

Federally insured by NCUA

Business/Organization Information Form

Please complete the following information, save the form and email it to lausman@westconsinu.org. Thank you!

Today's date
Business/Organization name
Address
City State Zip
Business/Organization web address
Name of the WESTconsin Credit Union representative who referred you to the Partnership Program

Business/Organization primary business/service
Current number of employees
Do you offer electronic payroll Direct Deposit to your employees?
Yes / No
Do you offer paper payroll checks to your employees?
Yes / No

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

Phone number

Fax number

Email address

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

Business/Organization **Owner/Managers** name

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)

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.

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