

# Form Type Worksheet

To help you organize the types of forms you will need, use this worksheet for multiple form types. Please return to your Conversion Coordinator or fax the completed form to **616.285.1569**.

## Loan and Application Forms

### LN Type

### AP Type

Form Name/Description	Print/Archive When Closing (Booking) a Loan	Print/Archive During the Loan App Process
Generic CU*BASE 5-page Loan Application	n/a	<input checked="" type="checkbox"/>
Generic CU*BASE Short Form Loan Application	n/a	<input checked="" type="checkbox"/>
Generic CU*BASE Loan Officer Worksheet	n/a	<input checked="" type="checkbox"/>
Generic CU*BASE Loan App Denial Notice (for loan denials only)	n/a	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

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More Loan and Application Forms

LN Type

AP Type

Form Name/Description	Print/Archive When Closing (Booking) a Loan	Print/Archive During the Loan App Process
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Other Forms

SH Type

Form Name/Description	Print and Archive	Print Without Electronic Archival
Membership Agreement Form ("Signature Card")	<input type="checkbox"/>	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>

\*Not available if archiving to the CU\*Spy vault.

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## Credit Union Acknowledgment

These forms have been reviewed and the summary of form type definitions is correct. Please create a Bid Sheet using the information that has been provided here. If there is an error in definition and the error is found at a later date, I understand that there may be additional charges to rectify the situation.

Credit Union Name \_\_\_\_\_

Name and Title of Credit Union Rep \_\_\_\_\_

Email Address \_\_\_\_\_ Phone \_\_\_\_\_

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