

Thank you for your interest in pursuing a business relationship with Montana's credit unions through the Montana Credit Union Network. This documentation will provide you an overview of the process. Please bear in mind this process may take several months.

Review Process: The screening process was discussed

1. Contact Tabitha Garvin, COO of Business Development
2. Complete the application questions below.
3. Applications will be examined by COO and a committee
4. Successful applicants will be presented to the LSG board

Application: The application will provide the Montana Credit Union Network all the pertinent information needed to begin the review process. Please take as much space as you need to address each of the items below. We appreciate your professionalism and attention to these details.

- Identify other business you are in partnership with
- Identify current Montana credit union clients
- Provide a sampling of current clients
- Identify your closest competitors
- Identify which PACs your company makes contributions to
- How do you intend to penetrate the Montana CU market? (Marketing plan for Montana. Growth goals for Montana etc.)
- What type of relationship are you seeking with LSG? (exclusive, non-exclusive, and revenue-share or paid for advertising)
- If we should reach an agreement, what is the estimated marketing reimbursement (minimum commitment must be \$1500 annually)?
- Provide copies of your last Annual Report and sample marketing materials
- Provide a letter of recommendation from a Montana CU client or other CU client

Please submit completed applications electronically to Tabitha@mcun.org.

For further inquiries, please contact me.

Sincerely,

Tabitha Garvin, Ph.D.
COO-Business Development
Ext 132