CHARTERING SUMMARY/CHECKLIST

Initial Contact: Date _____

1. Name: _____
2. Address: _____
3. Telephone Number: _____ Fax Number_____
4. Comments:_____

_____

_____

Information and documents requested by: _____Date: _____
Chartering package (letter and documents) mailed by: _____ Date: _____

Properly Executed Forms Received in Division:

_____ Investigation Report

_____ Investigation Fee $20.00

_____ Description of Common Bond/Field of Membership

_____ Meets minimum guidelines

_____ Overlap Evaluated

_____ Data Processing Capability Discussed

_____ Board of Directors Selected

_____ Supervisory Committee Selected

_____ Officers and Committeemen approved

_____ Agreement to Serve for each officer

_____ Credit Union Name Approved

_____ Business Plan

_____ Chartering Fee of $5.00

_____ Application for Insurance

_____ Articles of Incorporation Approved

_____ Bylaws Approved

_____ Articles and ByLaws Recorded in Register of Deeds

_____ Charter Issued (Effective Date same as date Articles Signed by Administrator)