

COMMUNITY BUSINESS PARTNER PROFILE



Credit Union of
Southern California
BUILDING BETTER LIVES

Company Name

Website Address

Type of Business or Industry

Phone Number, Extension

Address

City, State, Zip Code

Who is the credit union contact at your company?

Title

Phone Number, Extension

Email

Number of Employees

- | | | | |
|----------|---|--|------------------------------------|
| 1 | What is your payroll frequency? | <input type="checkbox"/> Weekly | <input type="checkbox"/> Bi-weekly |
| | | <input type="checkbox"/> Other _____ | |
| 2 | Can you process direct deposit/ACH services? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3 | What is the primary language spoken by your employees? | <input type="checkbox"/> English | <input type="checkbox"/> Spanish |
| | | <input type="checkbox"/> Other _____ | |
| 4 | How will you promote the credit union as part of your company's employee benefits package? Check all that apply. | <input type="checkbox"/> Schedule on-site visits with CU SoCal representative. | |
| | <input type="checkbox"/> Insert special promotions/advertisements into employees' paycheck envelopes. | <input type="checkbox"/> Include CU SoCal representative in new employee orientations: | |
| | <input type="checkbox"/> Publish informational articles in your company's newsletter. | <input type="checkbox"/> Monthly | <input type="checkbox"/> Quarterly |
| | <input type="checkbox"/> Post/distribute promotional materials in your office/ lunchroom throughout the year. | <input type="checkbox"/> Semi-Annually | <input type="checkbox"/> Annually |
| | <input type="checkbox"/> Offer free Lunch & Learn Financial Education Workshops. | <input type="checkbox"/> Include credit union information in new employee packets. | |
| 5 | How often may credit union representatives visit your location by appointment to talk with employees? | <input type="checkbox"/> Monthly | <input type="checkbox"/> Quarterly |
| | | <input type="checkbox"/> Semi-Annually | <input type="checkbox"/> Annually |
| 6 | Does your company sponsor an employee benefits fair? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 7 | Does your company have a retirement savings program such as a 401(k), 403(b), or profit sharing? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 8 | Would your company be interested in workshops such as financial planning, first-time home buyers, retirement planning, or financial literacy? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |