

REFER-A-FRIEND OR FAMILY MEMBER

TO OPEN A FINANCIAL PLUS CHECKING ACCOUNT* OR NEW LOAN,** AND
YOU BOTH RECEIVE \$25!^

3 EASY STEPS:

- 1) Fill out this form.
- 2) Give this form to your friend or family member by printing it off or emailing it to them, and recommend a Financial Plus checking account or new loan.
- 3) When your friend or family opens a Checking account* or loan** and shows this form, you both will receive \$25^!

CURRENT MEMBER INFORMATION:

FIRST NAME: _____

LAST NAME: _____

PHONE NUMBER: _____

ADDRESS: _____

CITY: _____

STATE: _____

ZIP: _____

*Federally insured by NCUA. Also privately insured by Excess Share Insurance (ESI). ESI is not affiliated with NCUA.

**Equal opportunity lender. Rates, terms, and conditions are subject to change and may vary based on creditworthiness, qualifications, and collateral conditions. All loans subject to approval.

^\$25 incentive for referring member is subject to 1099-MISC. \$25 incentive for new member is subject to 1099-INT. The \$25 incentive will be deposited into both the referring member and the new member's accounts within 5 business days after account opening. If the new member closes the account within 90 days, the \$25 must be reimbursed to Financial Plus Credit Union. Existing members may refer unlimited new members. Limit one \$25 incentive per new checking member. Unlimited \$25 incentive for each new funded loan. Only new checking accounts or loans over \$10,000 qualify for \$25 incentive. Referring member must be in good standing to receive \$25 incentive. Financial Plus reserves the right to reject any incentive redemptions. Cannot be combined with any other offer. Some restrictions and Financial Plus Credit Union standards apply. See Credit Union for full details.



FOR OFFICE USE ONLY:

DATE: _____ EMP #: _____

NM #: _____