



File Maintenance Form

Member Name: _____ **Account #:** _____

Reason: _____

Old Data: _____

New Data: _____

Member Name (Print): _____ **Date:** _____

Member Signature: _____ **Date:** _____

CREDIT UNION USE ONLY

IDENTIFY THE FOLLOWING

VISA ACCOUT #: _____
IF ACTIVE VISA ACCOUNT, PROVIDE COPY TO LOAN DEPT.

SAFE DEPOSIT BOX #: _____
IF ACTIVE S.D.B, PROVIDE COPY TO CUSTODIAN

SOCIAL SECURITY #: _____
IF ACTIVE IRA, PROVIDE COPY TO OPERATIONS MGR.

HOME BANKING Y/N: _____
IF ACTIVE HOME BANKING, UPDATE INTERACT

CO-SIGNER ON LOAN #: _____
COMPLETE IB3 SEARCH, PROVIDE COPY TO LOAN DEPT.

DEBIT CARD #: _____
IF ACTIVE DEBIT CARD, UPDATE CLIENT CENTRAL.

LENDING MAINTENANCE

LOAN #: _____
DUE DATE: _____
REF. CODE: _____
PAYROLL ID: _____

FIELD	OLD DATA	NEW DATA
12	_____	_____
52	_____	_____
I-Y-1	_____	_____

MSR INITIALS: _____ **DATE:** _____
REVIEWED BY: _____ **DATE:** _____

LOAN OFFICER INITIALS: _____ **DATE:** _____
REVIEWED BY: _____ **DATE:** _____