

## CREDIT UNION PERFORMANCE REPORTING INFORMATION SHEET

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### Marketing Representative Information

Name \_\_\_\_\_ Account Number \_\_\_\_\_  
Requestor \_\_\_\_\_ Date Submitted \_\_\_\_\_

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### Technology Information

Mainframe Company \_\_\_\_\_  
Mainframe Contact \_\_\_\_\_ Phone Number \_\_\_\_\_  
Systems Contact at Credit Union \_\_\_\_\_ Phone Number \_\_\_\_\_  
E-mail address \_\_\_\_\_ Phone Number \_\_\_\_\_ Fax \_\_\_\_\_

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### Production and Performance Reporting

Loan Calculation Method 365/365 \_\_\_\_\_ 365/360 \_\_\_\_\_ 360/360 \_\_\_\_\_

### Loan Office List

Provide loan office list in excel including the following information:

First and last name  
Loan officer code

### Goals

Overall goal

Product goal