Credit Union Scavenger Hunt

To find this information, start with your Supervisor. He/she should be able to share much of this information or point you in the right direction.

How My Credit Union Began

1. Date founded: ____________________________________________
2. Names of key founders: ____________________________________________
3. Why was the credit union started? ____________________________________________
4. Type of charter: state or federal? ____________________________________________
5. Original field of membership: ____________________________________________
6. Has the field of membership changed since the credit union started? If so, how? ____________________________________________
7. Current total membership: ____________________________________________
8. What regulators examine your credit union? ____________________________________________
9. What agency or company insures member shares? ____________________________________________

My Credit Union Structure

1. Name of the chairperson of the board of directors: ____________________________________________
2. Names of board members: __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

3. Find out about the business and community experience of the board members. What are a few of their areas of expertise that help the credit union? __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

4. Name of the president or manager of the credit union: __________________________________________

5. Names of members of the supervisory committee: __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

6. What are the supervisory committee’s responsibilities? __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

7. What other committees are most important to the operation of your credit union and what are their responsibilities? __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
8. In the space below, draw an organizational chart of your credit union with names and job titles of key members of management. Or, if you can obtain a copy, review your entire organizational chart.

9. Find out how your credit union holds its elections.

10. Does your credit union have an Annual Meeting? If so, who usually attends? What happens at the meeting?
Member Service

On the list below, check off the services your credit union offers and add any that are missing.

**Savings and Transaction Accounts**
- Regular share accounts
- Money market accounts
- Share certificates
- Retirement accounts (aka IRAs)
- Share draft accounts (aka checking)
- Savings goal accounts, such as holiday clubs and vacation clubs
- Other __________________________________

**Loans and Other Credit Services**
- Overdraft protection
- Credit cards
- Personal (signature) loans
- Education loans
- Business loans
- Auto loans (and leasing)
- Home purchase loans
- Home equity loans (and lines of credit)
- Other __________________________________

**Transaction Systems**
- Automatic payroll deposit
- Automatic transfers
- Telephone financial services
- ATM cards
- Debit cards
- Online financial services
- Electronic bill pay
- E-statements
- Other __________________________________

**Other Services**
- Traveler’s checks
- Money orders
- Safe deposit boxes
- Financial education seminars and publications
- Buying services and discounts
- Insurance policies
- Investment services
- Financial planning services
- How does your credit union provide member education and financial counseling to members?
How My Credit Union Is Involved in My Community

Your marketing and/or human resources specialists may be helpful with this section.

1. What charitable organizations or community events is your credit union involved in?

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

2. Is your credit union involved in communities beyond your local community? For example, has your credit union been involved in disaster relief for other areas?

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

3. Does your credit union have a development educator (DE) on staff?

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

4. Has your credit union been involved in international efforts?

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

5. Have you become involved in your credit union’s community involvement efforts? If not, how would you like to?

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
Other Organizations My Credit Union Is Affiliated With

1. What organizations, such as a state league or national association, is your credit union involved with? __________________________
   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________

2. How does your credit union help or otherwise contribute to these organizations?
   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________

3. What services or benefits does your credit union receive from these affiliations?
   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________

Your Credit Union’s Financial Condition

Look at your credit union’s last annual report to find most of this information.

1. Total assets: __________________________________________________________
2. Total member shares: _________________________________________________
3. Total loans to members: _______________________________________________
4. Reserves: ____________________________________________________________