

## I. ACCOUNTS

Quantity Ordered	Signature Card	Form No.	Quantity in Package
___	Single Account Cards	C-380	100
___	Joint Account Cards	C-171	100
___	Organization Cards	C-60	100
___	Temporary Cards	096	100
___	Checking Account Cards	C-628	100
___	Multi-Account Cards	648	100
___	Member Account Cards	Personalized	100

### IRA Forms

___	IRA Change of Account Information (2-part)	C-154	50
___	IRA Signature Card	C-169	50

### Payroll Deduction Cards

___	Start Deduction	C-260	100
___	Change Deduction	C-265	100
___	Stop Deduction	C-270	100
___	Combination: Start/Change/Stop	C-275	100

### Miscellaneous

___	Passbooks	CU-255	100
___	Passbook Plastic Envelopes (3 $\frac{3}{8}$ x 5 $\frac{1}{2}$ " )	C-505	100
___	Passbook Plastic Envelopes (3 $\frac{3}{8}$ x 4 $\frac{3}{4}$ " )	C-510	100
___	Passbook Plastic Envelopes (3 $\frac{3}{8}$ x 5 $\frac{1}{2}$ " )	C-515	100
___	Lost Passbook or Certificate Affidavit	879	100
___	Deposit Slips (Padded in 100's)	C-95	200
___	Dividend Sheets	C-140	100
___	Receipts for Cash Payments (Padded in 100's)	C-325	200
___	Share Account Cards	C-370	100
___	Share & Loan Cards	C-375	100
___	Withdrawal Slips	C-455	200

### Document Organizers

___	Pocket Folder (8 $\frac{1}{2}$ x 14" )	C-162	100
___	Pocket Folder (8 $\frac{1}{2}$ x 11" )	C-172	100
___	Document Holder (4 $\frac{1}{2}$ x 10 $\frac{1}{2}$ " )	C-182	100
___	Document Holder	Personalized	100

### Special Accounts

#### UNIFORM TRANSFER TO MINORS

___	Signature Cards (For Massachusetts)	626MA	100
___	Signature cards (For New Hampshire)	626NH	100
___	Signature Cards (For Rhode Island)	626RI	100
___	Brochure (For Massachusetts)	862MA	100
___	Brochure (For New Hampshire)	862NH	100
___	Brochure (For Rhode Island)	862RI	100

#### TRUSTEE ACCOUNTS (Single/Joint)

___	Signature Cards (Single/Joint)	624	100
___	Signature Cards (Irrevocable Trust)	699	100
___	Signature Cards (Revocable Trust)	698	100
___	Brochure	864	100
___	Trustee Account Agreement	874	100

## II. INSTALLMENT LENDING

Quantity Ordered	Loan Forms	Form No.	Quantity in Package
___	Loan Application - 8 $\frac{1}{2}$ x 11"	C-185	100
___	Loan Application - 8 $\frac{1}{2}$ x 14"	C-190	100
___	Note/Disclosure/Security Agreement - Simple Interest	C-600	100
___	Note/Disclosure/Security Agreement - Add-on Interest	C-605	100
___	Adjustable Rate Loan Note/Disclosure	762	100
___	Adjustable Notice	650	100
___	Open End Agreement	C-235	100
___	Open End Agreement/Indexing	C-237	100
___	Open End Credit Request Voucher	C-240	100
___	Notice to Co-Signer	258	100

___	Notice of Completed Application 062	100	
___	Notice of Incomplete Application & Request for Additional Information	063	100
___	Notice of Action Taken (federal chartered)	064	100
___	Notice of Action Taken (state chartered)	066	100
___	Credit Denial (federal chartered)	038	100
___	Credit Denial (state chartered)	040	100

### Secured Filings

___	UCC-1 Financing Statement	411	100
___	UCC-1AD Financing Statement Addendum	412	100
___	UCC-3 Financing Statement Amendment	913	100
___	UCC-3AD Financing Statement Amendment Addm.	913-A	100
___	UCC-5 Correction Statement	915	100
___	UCC-11 Information Request	911	100

### Delinquency Notices

___	Notice #1 (Padded in 50's)	C-75	100
___	Notice #2 (Padded in 50's)	C-80	100
___	Notice #3 (Padded in 50's)	C-85	100

### Miscellaneous

___	Arrears List	CU-40	50
___	Automobile Ins. Forms	C-15	100
___	Co-Maker Cards	C-50	50
___	Loan Cards	C-200	50
___	Irrevocable Stock or Bond Power (410)	227	100
___	Authority to Hypothecate Securities	101	100

## III. REAL ESTATE & REAL ESTATE RELATED

Quantity Ordered	First Mortgage - Fixed Rate	Form No.	Quantity in Package
___	Real Estate Loan Application	C-310	100
___	Good Faith Estimate	130	100
___	Fixed Rate Mortgage Disclosure Statement	708	100
___	Disclosure Sec. 17B	741	100
___	Direct Reduction Mortgage	810	100
___	Fixed Rate Mortgage Note (bi-weekly)	780	100
___	Fixed Rate Mortgage Note (monthly)	719	100
___	Notice to Co-Signer	258	100
___	RESPA Settlement Booklet	175	100
___	Settlement Statement, Pg. 1	012	100
___	Settlement Statement, Pg. 2	013	100
___	Lead Paint Law - Agreement Notice	607	100
___	Notice of Completed Application	062	100
___	Notice of Incomplete Application & Request for Additional Information	063	100
___	Notice of Action Taken (federal chartered)	064	100
___	Notice of Action Taken (state chartered)	066	100
___	Credit Denial (federal chartered)	038	100
___	Credit Denial (state chartered)	040	100
___	Discharge of R.E. Mortgage	095	100
___	Affidavit of Domestic Ownership	649	100
___	Affidavit of Jr. Financing	374	100
___	Notice of 1st Mtg. Disclosures (sign)	385	100
___	Non-Seller Mortgage Disclosures	749	100
___	Certification and Indemnification Agreement Regarding UREA Formaldehyde Insulation (UFFI)	493	100
___	Equal Housing Opportunity Sign - HUD (state chartered)	379	1
___	Equal Housing Lender Sign - NCUA (federal chartered)	380	1
___	Receipt 1st Mortgage Disclosure	795	100
___	Uniform Mtg. Loan Cost Worksheet	796	100
___	Consumer Guide to Buy Home Mtg.	797	100
___	Initial Escrow Account Disclosure Statement - Monthly	132	100
___	Initial Escrow Account Disclosure Statement - Bi-weekly	133	100
___	Uniform Residential Loan Application	930	100

___	Notice To Home Loan Applicants	788	100
___	Certification with Respect to MGL Ch. 183 Sec 28C	789	100
___	Fact Act Disclosure	892	100
___	Post Closing Notice-Fair and Accurate Reporting	787	100

### First Mortgage - Adjustable - Indexed

___	Adjustable Rate Mortgage Products	918	100
___	Mortgage	810	100
___	Notice to Co-Signer	258	100
___	Indexed ARM Note	706	100
___	Rider - ARM Indexed	707	100
___	TIL Disclosure	708	100
___	Fixed/Variable Rate - (Massachusetts, Sec. 17B)	741	100
___	Adjustment Notice - Indexed	685	100
___	Good Faith Estimate	130	100
___	Consumer Handbook - ARM	176	100
___	RESPA Settlement Booklet	175	100
___	Settlement Statement, Page 1	012	100
___	Settlement Statement, Page 2	013	100
___	Lead Paint Law - Agreement Notice	607	100
___	Non-Seller Mortgage Disclosure	749	100
___	Notice of Completed Application	062	100
___	Notice of Incomplete Application & Request for Additional Information	063	100
___	Notice of Action Taken (federal chartered)	064	100
___	Notice of Action Taken (state chartered)	066	100
___	Credit Denial (federal chartered)	038	100
___	Credit Denial (state chartered)	040	100
___	Discharge of R.E. Mortgage (was 115)	095	100
___	Affidavit of Domestic Ownership	649	100
___	Affidavit Jr. Financing	374	100
___	Certification and Indemnification Agreement Regarding UREA Formaldehyde Insulation (UFFI)	493	100
___	Receipt 1st Mortgage Disclosure	795	100
___	Uniform Mtg. Loan Cost Worksheet	796	100
___	Consumer Guide to Buy Home Mtg.	797	100
___	Initial Escrow Account Disclosure Statement - Monthly	132	100
___	Initial Escrow Account Disclosure Statement - Bi-weekly	133	100

### Second Mortgage - Fixed Rate

___	Application	C-310	100
___	Disclosure & Note	729	100
___	Notice to Co-Signer	258	100
___	Mortgage	811	100
___	Notice of Right to Cancel (Notice of Non-Exercise)	776	100
___	Notice of Right to Cancel (General)	777	100
___	Notice of Right to Cancel - Refinance	778	100
___	Lead Paint Law - Agreement Notice	607	100
___	Non-Seller Mortgage Disclosure	749	100
___	Fixed/Variable Rate - (Massachusetts, Sec. 17B)	741	100
___	Notice of Completed Application	062	100
___	Notice of Incomplete Application & Request for Additional Information	063	100
___	Notice of Action Taken (federal chartered)	064	100
___	Notice of Action Taken (state chartered)	066	100
___	Credit Denial (federal chartered)	038	100
___	Credit Denial (state chartered)	040	100
___	Discharge of R.E. Mortgage	095	100
___	Settlement Statement-HUD	009	100

### Second Mortgage - Adjustable - Non-Indexed

___	Disclosure - Truth in Lending	793	100
___	Mortgage	811	100
___	Rider	792	100
___	Note	791	100
___	Adjustment Notice	765	100
___	Notice to Co-Signer	258	100
___	Notice of Right to Cancel (Notice of Non-Exercise)	776	100

___	Notice of Right to Cancel	777	100
___	Notice of Right to Cancel - Refinance	778	100
___	Lead Paint Law - Agreement Notice	607	100
___	Non-Seller Mortgage Disclosure	749	100
___	Fixed/Variable Rate - (Massachusetts, Sec. 17B)	741	100
___	Notice of Completed Application 062	100	

___	Notice of Incomplete Application & Request for Additional Information	063	100
___	Notice of Action Taken (federal chartered)	064	100
___	Notice of Action Taken (state chartered)	066	100
___	Credit Denial (federal chartered)	038	100
___	Credit Denial (state chartered)	040	100
___	Adjustment Notice	765	100
___	Discharge of R.E. Mortgage	095	100
___	Settlement Statement	009	100

### Second Mortgage - Adjustable - Indexed

___	Mortgage	811	100
___	Note - 360 Day Basis	770	100
___	Note - 365 Day Basis	771	100
___	Notice to Co-Signer	258	100
___	Rider	772	100
___	TIL Disclosure	773	100
___	Fixed/Variable Rate - (Massachusetts, Sec. 17B)	741	100
___	Adjustment Notice	685	100
___	Notice of Right to Cancel (Notice of Non-Exercise)	776	100
___	Notice of Right to Cancel (General)	777	100
___	Notice of Right to Cancel (Refinance)	778	100
___	Lead Paint Law - Agreement Notice	607	100
___	Non-Seller Mortgage Disclosure	749	100
___	Notice of Completed Application	062	100
___	Notice of Incomplete Application & Request for Additional Information	063	100
___	Notice of Action Taken (federal chartered)	064	100
___	Notice of Action Taken (state chartered)	066	100
___	Credit Denial (federal chartered)	038	100
___	Credit Denial (state chartered)	040	100
___	Discharge of R.E. Mortgage	095	100
___	Settlement Statement	009	100

### Home Equity Loans

___	Revolving Credit Application	326	100
___	Revolving Credit Application	363	100
___	Revolving Credit Application	370	100
___	Revolving Credit Commitment Letter	327	100
___	Revolving Credit Note/Agreement (Interest plus percent of principal payment)	329	100
___	Notice of Amendments to Note & Agreement	260	100
___	Open End Credit Request Voucher	240	100
___	Revolving Credit Mortgage	330	100
___	Revolving Credit Note/Agreement (Percent of outstanding balance payment)	332	100
___	Notice of Amendments to Note and Agreement	261	100
___	Equity Conversion Mortgage Disclosure	293	100
___	Waiver of Right to Increase First Mortgage	378	100
___	Notice of Right to Cancel (Initial line of credit)	339	100
___	Notice of Right to Cancel (Increase in line of credit)	340	100
___	Notice of Right to Cancel (Notice of Non-Exercise)	776	100
___	Notice to Co-Signer	258	100
___	Notice of Completed Application	062	100
___	Notice of Incomplete Application & Request for Additional Information	063	100
___	Notice of Action Taken (federal chartered)	064	100
___	Notice of Action Taken (state chartered)	066	100
___	Credit Denial (federal chartered)	038	100
___	Credit Denial (state chartered)	040	100
___	Discharge of R.E. Mortgage	095	100
___	Amendment to Agreement and Mortgage	365	100
___	Authority to Terminate	369	100

# Forms and Supplies Order List

FOR ALL ORDERS, PLEASE COMPLETE BELOW

— FOLD FOR SELF MAILER —

CREDIT UNION \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY / TOWN \_\_\_\_\_ ZIP \_\_\_\_\_

\_\_\_\_\_  
AUTHORIZED SIGNATURE

DATE \_\_\_\_\_ TELEPHONE \_\_\_\_\_

**SPECIAL INSTRUCTIONS** (Please type or print clearly)

PHONE ORDER TAKEN BY: \_\_\_\_\_

DATE: \_\_\_\_\_

## CUSTOM ORDERS

All custom and imprinted orders must be submitted in writing. Custom orders are not returnable.

## RETURN POLICY

Stock orders may be returned within 15 days of shipment. You must receive prior approval before returning. Customer is responsible for all shipping charges.

## TERMS

Our terms are net 30 days. All invoices are subject to a 1.5% finance charge after 30 days.



45 CALVARY STREET  
WALTHAM, MA 02453-5974  
781.891-0303  
800.235-6715  
FAX 781.647-9854  
UPDATE@BGPFORMS.COM

*Compliance with Confidence*

## IV. CREDIT CARDS

Quantity Ordered	Credit Card For Payment Systems, Inc. Members	Form No.
AG PROGRAM	- Interest calculated to day of payment on cash advances. Grace Period applies to merchandise purchase.	
FG PROGRAM	- Grace Period applies to both cash advances and merchandise purchases.	
AGREEMENT	- Size 8½" x 14" - 3 parts - requires signature of applicant(s)	
	Average Daily Balance Method	1057AG
	Average Daily Balance Method	1057FG
	Average Daily Balance Method - Indexed	1059AG
	Average Daily Balance Method - Indexed	1059FG
	Daily Balance Method	1060AG
	Daily Balance Method	1060FG
	Line of Credit secured by a specified deposit acct.	2057AG
	Line of Credit secured by a specified deposit acct.	2057FG
	Secured Credit Card Security Agreement	2057-S
	Combined Application and Agreement	personalized
AGREEMENT	- Size 7 x 8½" folded to 3½" (No signature req.)	
APPLICATION	- Size 8½" x 14"	
	Average Daily Balance Calculation Method	058A
	Daily Balance Calculation Method	058D
	Average Daily Balance Calculation Method - Indexed	058X
COMMITMENT LETTER	- Size 8½" x 11" - 2-part	059
CANCELLATION	- Request To Cancel Credit Card Agreement	
	Size 8½" x 11"	060
UNAUTHORIZED USE OF CREDIT CARD		052
TYVEK ENVELOPES	- (ATM/Credit Cards)	073

## V. ACCOUNTING & ADMINISTRATIVE

Quantity Ordered	Form No.	Quantity in Package
___ Auditing Committee Record Sheets	C-10	100
___ Collection Sheets (Padded in 100's)	C-45	200
___ Credit Committee Record Sheets	C-65	100
___ Credit Union Jurat	C-230	25
___ Secretary Minute Book Covers	C-105	1
___ Secretary Book Sheets (1 - 300)	C-106	1
___ Comparative Statement of Condition	C-405	100
___ Statement of Condition	C-406	100

## VI. SIGNS

Quantity Ordered	Form No.
___ Credit Application Signs (Mass.)	301
___ First Mortgage	385
___ Equal Housing (State Chartered)	379
___ Equal Housing (Federal Chartered)	380
___ CRA Notice (Mass.)	C-320
___ Availability of Funds	1159
___ Availability of Funds (Special Order)	
___ NCUA Sign (Lucite) 7 x 3"	337
___ NCUA Decal (7 x 3" - 2 sides)	338
___ ATM Fee Signs (Special Order)	

## VII. Bankers Group Personalized Disclosures

Personalized to meet requirements of the program you offer.

Combined Application and Agreements for  
Equity Loans, Personal Loans and Credit Cards  
Funds of Availability  
Truth and Savings  
Money Market  
Combined Disclosures  
Marketing Brochures

___ Equity Reserve Note & Agreement (Int. plus % of Principal Pay)	329	100
___ Equity Reserve Note & Agreement (% of Principal Pay)	331	100
___ Equity Reserve Note & Agreement (% of Interest and Principal Pay)	332	100
___ Equity Reserve Note & Agreement (Payroll Deduction % of Principal Drawn)	334	100
<b>Equity Important Terms Disclosure</b>		
___ For 329 Note	341	100
___ For 329 DR Note	341 DR	100
___ For 331 Note	344	100
___ For 332 Note	342	100
___ For 334 Note	351	100
(For Equity Note & Agreement Calculated on Daily Balance Add "D" to Above Form Numbers)		
___ Notice of Revocation of Credit Line	336	100
___ Home Equity Pamphlet	343	100
___ Request for Credit Advance (Voucher)	356	100
___ Request and Authorization to Reinstate	357	100
___ Amendment to Note/Agreement/Mortgage (Extend Draw Period)	355	100
___ Amendment to Note/Agreement/Mortgage (Convert to Closed End)	359	100
___ Fixed/Variable Rate - (Massachusetts, Sec. 17B)	741	100
___ Non-Seller Mortgage Disclosures	749	100
<b>Home Improvement Loans</b>		
<b>Use forms under Second Mortgage Fixed Rate or Adjustable Rate</b>		
___ Home Improvement Loan Agreement and Completion Certificate	CU-160	100
___ Notice of Incomplete Application & Request for Additional Information	063	100
___ Notice of Action Taken, Statement of Reasons and Counteroffer	066	100
___ Notice to Co-Signer	258	100
___ Loan Application	C-195	100
___ Notice of Completed Application	062	100
___ Notice of Incomplete Application & Request for Additional Information	063	100
___ Notice of Action Taken (federal chartered)	064	100
___ Notice of Action Taken (state chartered)	066	100
___ Note/Disclosure/Security Agreement - Simple Interest	C-600	100
___ Note/Disclosure/Security Agreement - Add-on Interest	C-605	100
___ Notice to Co-Signer	258	100
___ Notice of Right to Cancel (Notice of Non-Exercise)	776	100
___ Notice of Right to Cancel (General)	777	100
___ Notice of Right to Cancel (Refinance)	778	100
___ Credit Denial (federal chartered)	038	100
___ Credit Denial (state chartered)	040	100
___ Mortgage Deed (Short Form)	809	100
___ Settlement Statement	009	100
<b>Secured Filings</b>		
___ UCC-1 Financing Statement	411	100
___ UCC-1AD Financing Statement Addendum	412	100
___ UCC-3 Financing Statement Amendment	913	100
___ UCC-3AD Financing Statement Amendment Adm.	913-A	100
___ UCC-5 Correction Statement	915	100
___ UCC-11 Information Request	911	100

PLACE  
STAMP  
HERE

**Bankers Group Purchasing**  
45 Calvary Street  
Waltham, MA 02453-5974