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Site Visit Request Form

Credit Union Name: _____

Credit Union Contact: _____

Requested Site Visit Date: _____

(Please list up to three choices for dates credit union staff is available)

Real Estate Site Visit Review: The Real estate operational review is designed to review the following areas with staff that it pertains to. This is for employees who are already familiar with these programs and/or processes, but could use a refresher. The hours assigned cannot be modified.

	<i>Check if interested in this session:</i>	<i>Total Number of staff attending this session:</i>
Mortgagebot - Review Mortgagebot Procedures - 2 hours		
New Loan Package - Review Procedures and Forms - 1 hour		
Lock/Register Loan - Review Procedures - 1 hour		
Available Loan Programs - Review of where to find different mortgage programs - 1 hour		
Loan Servicing - Review controls, reports, delinquencies and payment processes - 3 hours		
Total Combined Hours:		

Send completed form to: Chandra Thronson at chandrat@cu-mont.com or fax to: 406-259-1070