

**APPLICATION FOR SELECT GROUP
EXPANSION OF THE FIELD OF MEMBERSHIP**

This is an application of the credit union named below to add the following named select group to its field of membership. The application form must be completed fully or it will be returned to the credit union for completion and resubmission. The Division reserves the right to request additional information relating to the field of membership expansion, as provided by rule 1301:9-2-17 of the Ohio Administrative Code. Please type or print all answers.

When a group is eligible for membership in another credit union, an overlap of credit union services exists. If an overlap exists, the applicant credit union must pursue one or more of the options noted below and must include with this application written evidence, which resolves any overlap situation.

- A) The applicant credit union may enter into an agreement with the credit union which currently has the group within its field of membership permitting the two credit unions to service the group simultaneously; or
- B) The select group may seek a voluntary release from the credit union which currently has the group within its field of membership; or
- C) The select group may initiate disaffiliation proceedings in accordance with rule 1301:9-2-18 of the Ohio Administration Code*, or
- D) The applicant credit union may request that the Division consider justifications for overlap by meeting the requirements set forth in rule 1301:9-2-16(D)(1)(b)(iv) of the Ohio Administration Code*.

** Options C and D are both subject to approval by the Division*

To assist in the application process, a credit union may verify if the proposed select group is already in another credit union's field of membership by calling the Division's corporate Section at (614) 728-8400.

1) Name of applicant credit union: Sharefax Credit Union, Inc
1147 Old State Route 74
Batavia, Ohio 45103

Contact person: Jessica McDaniel Email: JMcDaniel@sharefax.org Phone: (513) 753-2440 ext.8511

2) Complete legal name of select group (For example, a corporation should use the legal name of the corporation as set forth in its articles of incorporation):

Doing business as (DBA) (if applicable): _____

Address: _____

City: _____ State: _____ Zip: _____ Phone: _____

I, _____, as authorized representative of the above-named select group, hereby request service from the applicant credit union on behalf of the select group, and certify that the above-named select group (check one) is ___ or is not ___ currently being served or eligible to be served by another credit union.

Name: _____ Title: _____ Date: _____

Email address: _____ Contact Phone: _____

Signature: _____

3) The common bond for the select group must be either occupational or association. A common bond of occupation exists when the members of the group are employed by a single employer. A common bond of association exists when the members of the group belong to a single organization, club or association.

The proposed select group's common bond is (select one): Occupational _____ Associational _____

4) What is the approximate number of persons in the proposed select group? _____

5) How many people in the proposed select group are likely to become members of the credit union? _____

6) What is the distance between the select group's work/meeting place and the nearest credit union office? _____

7) The nearest office is: the home office _____ a service facility _____

Please give the address of the nearest credit union office to the group, if it is not the home office:

Address: _____

City: _____ State: _____ Zip: _____

8) Will the credit union be offering payroll deduction services to the group? Yes _____ No _____

9) Does the addition of the select group involve expansion of the credit union's services beyond the boundaries of the State of Ohio? Yes _____ No _____

If "yes" please list which state(s) would be affected: _____

Please provide the following additional information for use by the credit union only:

CEO/President: _____ Website: _____

Mailing Address (if different): _____

City: _____ State: _____ Zip: _____

Business Description: _____

Primary Contact: _____ Phone: _____

Email Address: _____ Preferred Contact: Email Phone

Payroll Contact: _____ Phone: _____

Email Address: _____ Preferred Contact: Email Phone

For Office Use Only

CERTIFICATION, SIGNATURE AND TITLE OF CREDIT UNION OFFICIAL

I, the undersigned officer of the above-named credit union, do hereby certify to the Ohio Division of Financial Institutions that by an affirmative vote of _____ of the Board of Directors at a meeting, at which quorum has present, held on the _____ day of _____, 20____, a resolution was approved authorizing the above-named select group to be included within the credit union's field of membership.

Signature: _____ Title: _____ Date: _____