



CREDIT UNION FOUNDATION
OF MARYLAND AND THE DISTRICT OF COLUMBIA



ROYCROFT MASTERS
ADVISOR REQUEST FORM

The Foundation's Roycroft Masters Program is designed for MD & DC-based credit unions with approximately \$100 million or less in assets. Roycroft Masters are recognized professionals who have been actively engaged in the credit union movement and who offer short-term assistance on a voluntary basis. There is no fee for credit unions' participation in the program.

The Roycroft Masters Program is designed to allow participating credit unions to benefit from the experience of their paired advisor and a fresh perspective on issues.

Advisory concentrations may include among other issues:

- Building your loan portfolio
- Governance issues
- Starting or evaluating a new program or member service
- Preparing for an NCUA examination

Participating credit unions receive:

- Initial on-site visit from a Roycroft Master
- Follow-up advice/mentoring via telephone or email
- Free access to LINX[®], the WEB-based credit union forum for the exchange of advice, documentation, etc.

This program, like all Foundation efforts, is made possible through the generosity of our donors. To see a listing of our valued sponsors, please visit:

<http://www.cufound.org/supporters.htm>.

To apply for Roycroft Masters assistance, please complete the requested information on the following page, save your completed document, and email it to: training@cufound.org, or fax to (443) 853-1977, or mail to the address shown on page 2 of this application.

Foundation Use:

Received Date: _____
Advisor Pairing Date: _____
Roycroft Master: _____

Your Name: REQUIRED

Title: _____

Credit Union: REQUIRED

Address: REQUIRED

City/State/Zip: REQUIRED

Phone: REQUIRED Fax: _____

E-mail: REQUIRED

CU Assets: \$ REQUIRED

1. Please select the general area(s) of focus for this advisory session *(Check all that apply)*

- | | | |
|--|-------------------------------------|--|
| <input type="checkbox"/> Operations | <input type="checkbox"/> Compliance | <input type="checkbox"/> Lending |
| <input type="checkbox"/> Governance | <input type="checkbox"/> Facilities | <input type="checkbox"/> Human Resources |
| <input type="checkbox"/> Leadership | <input type="checkbox"/> Marketing | <input type="checkbox"/> Finance/Investments |
| <input type="checkbox"/> Other: (please specify) _____ | | |

2. Provide a descriptive statement of the problem or challenge you are facing that will be the focus of your advisory engagement: REQUIRED

3. Provide a brief description below of your engagement expectations. Describe the outcome(s) you would like to receive through your Roycroft Masters advisory engagement. This will help your advisor grasp the scope of the engagement.

“At the completion of this engagement I hope that I will...REQUIRED”

4. Has your credit union received Roycroft Masters advisory support in the past year? Yes No

Once approved, you will receive an Advisee Agreement prior to commencement of the advisory engagement.

Signatures:

Applicant

Date _____

President/CEO *(if different than applicant)*

Date _____

Return This Completed Form

Via Email: <mailto:training@cufound.org?subject=Roycroft Masters Inquiry>

Via FAX: (443) 853-1977

Or Mail To:

CREDIT UNION FOUNDATION
P.O. Box 190 • Glenelg, MD 21737-0190

Questions? Call (443) 325-0771