

Regulatory Information

1. Please provide the date of the most recent annual meeting held by the credit union: 4/23/2025

2. Please provide the effective date of the most recent supervisory committee or financial statement audit: 12/31/2024

3. Please select the last type of audit performed for the credit union's records:

a. Financial statement audit performed by state licensed persons

b. Supervisory Committee audit performed by state licensed persons

c. Supervisory Committee audit performed by other external auditors

d. Supervisory Committee audit performed by the supervisory committee or designated staff

4. Provide the name of the Audit Firm or Auditor (see instructions) (b)(4); (b)(8)

5. Please provide the effective date of the most recent Supervisory Committee verification of member's accounts : 12/1/2025

6. Who completed the verification of member's accounts: a. Supervisory Committee b. Third Party

7. Provide your Supervisory or Audit Committee contact information for public/official correspondence

Mailing Address: (b)(4); (b)(8) Email: (b)(4); (b)(6); (b)(8)

Mailing City: (b)(4); (b)(8) State: (b)(4); Zip Code: (b)(4); (b)(8)

8. Provide the effective date of the most recent Bank Secrecy Act Independent Test: (b)(4);

9. Indicate the Fidelity Bond Provider Name : Other - TruStage CUMIS Insurance Society, Inc.

10. Indicate the amount of Fidelity Coverage for any Single Loss (RR 713.5): (b)(4); (b)(8)

11. Please provide Section 701.4 certification date (Federal Credit Unions Only): (b)(4); (b)(8)
Certification Date

12. Please provide Section 701.4 certifier's name (Federal Credit Unions Only): (b)(4); (b)(6); (b)(8)
Certified By

13. Please provide Section 701.4 certifier's job title (Federal Credit Unions Only): (b)(4); (b)(8)
Job Title

Equal Employment Opportunity

14. Does your credit union meet any of the following criteria? (Yes/No) (b)(4); (b)(8)

- Credit union with 100 or more employees; or
- Credit union with 50 or more employees and:
 - 1) Has a contract of at least \$50,000 with the Federal government; or
 - 2) Serves as a depository of U.S. government funds of any amount; or
 - 3) Serves as a paying agent for U.S. Savings Bonds.

a. If yes, what is the last date you filed an EEO-1 Survey Report with the U.S. Equal Employment Opportunity Commission (MM/DD/YYYY)? (b)(4); (b)(8)

b. If yes, do you have a diversity policy and/or program in your credit union? (Yes/No) (b)(4); (b)(8)

Home Mortgage Disclosure Act - Loan Application Register criteria

15. Is your credit union located in a Metropolitan Statistical Area (MSA)? (b)(4); (b)(8) Yes No

16. Did your credit union originate at least one home purchase loan or refinance a home purchase loan secured by a first lien on a one-to-four unit dwelling during the preceding calendar year? (b)(4); (b)(8) Yes No

17. Did your credit union originate closed-end mortgages in each of the two preceding calendar years OR originate open-end lines of credit in each of the two preceding calendar years in excess of the HMDA Loan-Volume Threshold? (b)(4); (b)(8) Yes No

18. If you answered yes to all three questions, please provide your HMDA LAR filing date. (b)(4); (b)(8)

Trade Names

19. List any trade names the credit union uses for signage or advertising.

(b)(4); (b)(8) (b)(4); (b)(8)