



Financial Partnership

Onboarding

Organization: _____

Primary Contact Name: _____

Phone: _____

Email: _____

Secondary Contact Name: _____

Phone: _____

Email: _____

Number of Locations: _____

Number of Shifts: _____

Shift Changes: _____

Break Times: _____

Method of Pay

What type of payroll forms: _____

☐ Set

☐ Net

How many financials can they choose? _____

Do they use a temp agency for hiring? ☐ Yes ☐ No

Do they use a pay card as an option? ☐ Yes ☐ No

Organization Events:

- ☐ New Employee Orientation
- ☐ Lunch & Learns
- ☐ Financial Presentations
- ☐ Wellness Fairs
- ☐ Benefit Fairs
- ☐ Employee Appreciation Events

Interested in the following financial services:

- ☐ Payroll deduction and/or direct deposit services
- ☐ Free on-site financial workshops
- ☐ Free online money management tools
- ☐ Financial education information provided by Dupaco
- ☐ Monthly Newsletters
- ☐ Complimentary information packets for new employees
- ☐ Display posters and brochures Number of Posters Needed: _____
- ☐ Scheduled on-site visits with Dupaco financial coaches

On-Site Visits

Number of on-site visits: _____

How often?: _____

Best days/times for on-site visits: _____



Financial Partnership

Announcement

RESPECTFULLY SUBMITTED TO:

Board of Directors
Dupaco Community Credit Union
3999 Pennsylvania Ave.
Dubuque, Iowa 52002

ON BEHALF OF:

Dupaco Community Credit Union

Board of Directors:

Our organization, _____, has agreed to participate with
Dupaco Community Credit Union as a partner to provide financial wellness in the workplace.

Thank you for your partnership,

Signature

Date

Print Name

Company Name

Address

City State ZIP

Number of Employees: