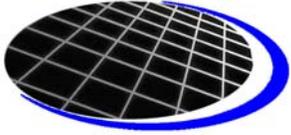


FORMS design



Integrating Forms for Credit Unions

Forms Automation
Software for the
Ultradata® System

Thermal Receipt Printers
and Supplies

Signature Pads

Laser Check Printers

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Dear Credit Union Official:

Thank you for the opportunity to work with you on your Ultradata forms. We have extensive knowledge in the Ultradata system and the forms conversion process so we'd like to take some time here to discuss how the process works. Included are the Agreement and the Maintenance Contract. You will need to sign both and fax us a copy of each.

Project Overview

In about 30 days or less, you will receive a file from us that has your new forms included. We will email you the file and make it easy for you to install. You simply double click on the attachment and it will self-install on your PC only. You will want to test these forms and make sure they print fine and look great. Since each form is custom written, you will want to spend some time checking the data linking to make sure it is working the way you want. We anticipate that you will want to make changes to your forms and the support for those changes is included.

User Defined Fields

The forms are developed in Microsoft Access. Ultradata has built several different tables in Access that allows us to draw information from your host system to populate the forms. *Not all of the information that you see on your screen is available to be data linked to the form.* This is especially true in FSP Front Office. When we find that you need more control over a variable on the form, we will insert a user-defined field for you. For example, on a Settlement Statement for real estate lending, you may desire to have all of the fields defined for the amounts and whom to pay. We place user defined fields in each of these variables to give you total control over the form's content.

Form Sets

Ultradata has created the ability to put forms into sets. These sets can subdivide your forms into the appropriate heading and pick only the forms needed for each document set. For example, you may have a document set called "Lease Vehicles" and want to only place the Loan Application, the Loan Disclosure, the Insurance Application and Certificate and a GAP form. When the loan officer clicks on the document set "Lease Vehicles" only those forms are available to print, thus making it easier to choose. Please let us know what Form sets you'd like and how you want them named and what forms to include. Check our website for examples of document sets.

Printing

We design each form to print to the loan officer's default printer. Each form will print in the size received from the 3rd party supplier, i.e. 8.5" X 11" (letter) or 8.5" X 14" (legal). By default, we assume that the letter size is your default tray and the legal size is your lower or manual feed tray. We will also program each form to print duplex unless otherwise specified by you. If your printer does not support duplex printing, then single sided printing will occur.

Copyrighted Forms

We need to make sure that you understand that your credit union holds the responsibility for all the copyrighted forms from 3rd party vendors, such as CU Documents, Inc., CUNA Mutual, Wolters Kluwer or any other vendor. We have no way of knowing if you have a contract with these folks or if your desired changes have been approved. Therefore, we have written specific language in our contract that puts the burden of any possible copyright violation on you. Please make sure you have any forms and changes approved by the 3rd party vendor. Once you are satisfied with your new forms, you will want to send a copy of them to your vendor so they can audit them for accuracy. If you have any questions, please feel free to contact us.

Here is a list of items we need to begin your electronic forms conversion:

- A signed copy of the maintenance contract and agreement faxed to us.
- The original forms that you wish to be programmed. If you are ordering your forms from CUNA Mutual, let them know that Forms Design, Inc. will be your integrator and they will deliver your forms directly to us.
- Your ALPSFORM.ACCB file &/or your FOFORM.ACCB file. Please refer to our website for details on how to get these to us.
- A bitmap image of your credit union logo. Usually, your marketing department has these.

If you have any questions, please feel free to contact us either via email or phone. We look forward to working with you!

To automatically fill in the following forms, move your mouse into the boxes and type in the information.

Credit Union Name:

Your Name:

Your Title:

Today's Date:

(Format: mm/dd/yy)

Please PRINT this form using your browser's print icon.

Discard this copy after you print.

FORMS DESIGN, INC.

Forms Maintenance Agreement

Between: Forms Design, Inc. &

Credit Union Name: _____

Dated: _____

Forms Design, Inc. will maintain _____ Credit Union's (herein "Credit Union") forms during the maintenance period. The maintenance period begins on the date of this agreement and ends on the next December 31 of the same year. This agreement will automatically renew on the next January 1 for a period of one year. Either party may cancel this agreement at any time for any reason. No refund will be given for any remaining term.

During the maintenance period, Forms Design, Inc. will provide the following services:

- **Provide reasonable changes to any forms* as needed by Credit Union.** Reasonable is defined as up to 25% of the content of the form. Form change requests involving greater than 25% of the form content will require an additional negotiated fee between the Credit Union and Forms Design, Inc.
- **Provide disaster recovery services of the forms file.** In the event your file becomes corrupt or deleted, we will provide you with our latest version of your forms file. You may be required to upgrade the version to your newest version release.
- **Maintain your entire forms database for any upgrades, enhancements, or changes.** This includes any changes to your forms database during a conversion, if required. Please notify us of any upcoming conversions so that we may assist your information technology employees, if necessary. We will only cover forms that we create.
- **Let you know of any changes that we hear of from your compliance council.** You may want to let your forms vendor know that Forms Design, Inc. is your forms integrator so they can pass any regulatory changes on to us for file updates.

Details

The maintenance plan is prorated for the first year from the month you sign up until December 31 then annualized on the subsequent January. Billing for the year is in January. You may cancel the plan at any time, but no refunds will be given. Any requested changes to forms that exceed 25% of the content will require a negotiated fee between Forms Design, Inc. and the Credit Union. \$50 per month late fee for any past due invoices.

Pricing is based on the number of forms in your combined libraries (both FO and ALPs). For CUs with 1 - 4 forms, the price is \$30/mo. 5 - 25 forms is \$165/mo, 26 - 50 forms is \$225/mo, 51 - 100 forms is \$275/mo, 101 - 150 forms is \$330/mo, and for CUs with 151 on up, the price is \$350/mo.

**The Credit Union is responsible to obtain written approval from the copyright holder before Forms Design can make modifications to copyrighted forms.*

The fee for these services is outlined above, billed annually and payable in advance. Prices for products, services and support are subject to change without notice.



Tal Novak, Forms Design, Inc.

Via Web
Date

Authorized Signer on behalf of
Credit Union

Date

