



# Partnership Agreement

Oregonians Federal Credit Union  
And \_\_\_\_\_

This agreement, dated \_\_\_\_\_, is between Oregonians Federal Credit Union (“OFCU”) and \_\_\_\_\_ (“Company”). Partnership with OFCU will be provided at no cost to Company. This Partnership Agreement outlines certain actions to be taken by both parties to ensure a successful and mutually beneficial relationship. Agreeing to these terms will assist both parties to maximize the benefits of our partnership.

### Oregonians Credit Union agrees to:

1. Accept electronic transmissions of the Company’s employee payroll.
2. Provide marketing and educational materials such as brochures, applications, payroll inserts, membership packets, and posters at no cost to the Company.
3. Make available OFCU staff for new employee orientations and on-site credit union visits as agreed to with the Company.
4. Recognize that all information about employees of the Company remains the property of the Company and that OFCU will use it only for the purpose of contacting employees about membership opportunities. At all times the information will be treated as confidential.
5. Provide free financial education seminars at Company upon request.
6. Provide financial counseling services at Company events upon request.
7. Support and/or participate in company events upon request.
8. Provide financial education articles for Company publications upon request.
9. Provide a link to the OFCU web site from the Company’s Intranet.

\_\_\_\_\_ agrees to:

1. Designate an OFCU contact at each separate Company work location that will be responsible for distributing credit union information to employees.
2. Participate in an initial roll out of credit union benefits to all employees of Company.
3. Periodically allow on-site OFCU presentations and/or visits as scheduled by company and OFCU.
4. Display and distribute OFCU marketing and educational materials at Company’s work sites in brochure racks, on bulletin boards, on the intranet at no cost to the Company.

\_\_\_\_\_  
Company Rep Signature                      Date

\_\_\_\_\_  
OFCU Rep Signature                      Date

\_\_\_\_\_  
Company Rep Name

Emily Spall \_\_\_\_\_  
OFCU Rep Name

\_\_\_\_\_  
Title at Company

Marketing Outreach Coordinator \_\_\_\_\_  
Title at Oregonians Credit Union

Nature of Business \_\_\_\_\_

Phone number: 503.833.5197

Number of Employees \_\_\_\_\_

Fax: 503.353.7731

Phone number: \_\_\_\_\_

Email: emilys@ofcu.com

Email: \_\_\_\_\_

Address: \_\_\_\_\_

Address: 6915 SE Lake Rd, Milwaukie, OR 97267

Owner: \_\_\_\_\_