

# Board of Directors Candidate Application



Name: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

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

Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_ Hire Date: \_\_\_\_\_

Are you currently, or have you ever been, related to a PFCU employee, board member, or committee member:  Yes  No If yes, please give the name of family member(s) and the position they held with PFCU: \_\_\_\_\_

High School graduate:  Yes  No

College graduate:  Yes  No If yes - College and Major: \_\_\_\_\_

Is PFCU your primary Financial Institution:  Yes  No

Pioneer Federal Credit Union Services Used:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Checking         | <input type="checkbox"/> Medical/Health Savings | <input type="checkbox"/> First/Second Mortgage      |
| <input type="checkbox"/> Change Forward   | <input type="checkbox"/> Certificate of Deposit | <input type="checkbox"/> Home Equity Line of Credit |
| <input type="checkbox"/> myPioneer        | <input type="checkbox"/> IRA Shares             | <input type="checkbox"/> Consumer Loan              |
| <input type="checkbox"/> myPioneer Mobile | <input type="checkbox"/> Business Account       |   |
| <input type="checkbox"/> Money Market     | <input type="checkbox"/> VISA Credit Card       |   |

Are you a member of any professional societies or associations:  Yes  No If yes, please list:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other than PFCU, have you ever served as an official, director, committee member, or employee of any other financial institution:  Yes  No If yes, please list:

Institution	Position	Dates
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other relevant training or educational accomplishments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Describe your drive or motivation to continue serving, as a PFCU Board Member: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please answer the following questions that address the minimum qualification requirements:

% Have you ever been denied fidelity bond coverage, had bond coverage cancelled or revoked, or been notified that you are not eligible to obtain bond coverage? Yes No

& Have you ever had a judgment issued against you in a civil action based upon grounds of fraud, deceit or misrepresentation? Yes No

' Have you ever caused this credit union to suffer a financial loss? Yes No

(" Have you ever been removed from office by any regulatory or governmental agency while acting as an officer, agent, employee, consultant, or representative of any financial institution? Yes No

) Have you ever been personally subject to an operating directive for cause while serving as an officer, director, or senior executive management personnel of any financial institution? Yes No

\* Have you ever caused or participated in an activity that resulted in the suspension or revocation of a financial institution's certificate of incorporation, or authority or license to do business? Yes No

+ Have you ever been convicted of any criminal offense involving dishonesty or a breach of trust? Yes No

, Are there any legal or administrative proceedings pending against you? Yes No

If you answered "Yes" to any of the preceding questions, please attach a separate sheet providing additional information regarding the circumstances.

In the event that a background check will be conducted, please provide the following information:

Date of Birth: \_\_\_\_\_ City/State of Birth: \_\_\_\_\_

Any other names you have used: \_\_\_\_\_

Previous addresses during the past 5 years: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### Certification and Agreement to Serve

I certify that the information provided on this form is true and correct. If elected or appointed to the Board, I pledge to carry out my duties and responsibilities commensurate with said position as promulgated by the Idaho Finance Code and bylaws of Pioneer Federal. I authorize the credit union to obtain a credit report and other information necessary to complete a background check.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**BACKGROUND SCREENING- CONSUMER REPORT  
INVESTIGATIVE CONSUMER REPORT REQUEST,  
AUTHORIZATION, CONSENT AND RELEASE**

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First Name	Middle Name	Last Name	Suffix (Jr., Sr. II, etc.)
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Other names you have used or may be known as:  
including but not limited to nicknames, Maiden names, or previously used first or last names.

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I understand that in conjunction with my application to serve on the Board of Directors or Supervisory Committee, Pioneer Federal Credit Union (PFCU) will use the services of an outside agency to research and verify the information that I have provided including my personal background, character, professional standing, work history and qualifications.

This agency will provide a report to PFCU. PFCU uses **VeriFirst Background Screening, LLC**, a consumer-reporting agency, as an agent to perform background verifications, and provide Consumer Reports and Investigative Consumer Reports.

**VeriFirst Background Screening, LLC** will utilize various sources of information it deems appropriate including but not limited to credit reporting agencies, Department of Motor Vehicle records, criminal conviction records, current and former employers, educational records, professional and personal references.

I request, authorize, and consent to the release and disclosure of any and all information including but not limited to the above to PFCU and **VeriFirst Background Screening, LLC**. I further request, authorize, and consent to the procurement of a Consumer Report by PFCU and **VeriFirst Background Screening, LLC** as part of PFCU's background check and investigation.

I request, authorize, and consent to the procurement of an Investigative Consumer Report by PFCU and **VeriFirst Background Screening, LLC** as part of the PFCU Volunteer screening process.

I understand that the Investigative Consumer Report may contain information about my background, mode of living, character, personal character, general reputation, work habits, work performance and experience, reasons for discipline or termination from any current or prior employment, history of earnings, credit worthiness, credit standing or credit capacity, criminal convictions, driving history, and other related matters that may negatively impact my eligibility for the volunteer position I am seeking.

I understand that I have the right to make a written request, within a reasonable period of time after receiving this notice, for additional disclosures as to the nature and scope of any consumer report(s) we obtain. I am also entitled to receive a copy of the Federal Trade Commission's publication, "A Summary of Your Rights under the Fair Credit Reporting Act."

By signing this form, I authorize any present or past employer, supervisor or agent of the employer; high school, college, university or other institution of learning; local, state or federal court; Department of Motor Vehicles, military branch or the national personnel records center; state sex offender registry, state licensing board, credit bureau, personal or professional reference; to release records or information to CRA concerning my name, criminal history, motor vehicle history, social security number, earnings history, credit file, address history, educational history, character, reputation, and employment (including documented reasons for termination or discipline) and release such from any and all liability for any damage that may result from the furnishing of this information. This authorization shall be valid in original, faxed or photocopied form.

PFCU will notify me prior to, and after taking, adverse action against me such as eliminating my application to volunteer because of information obtained from a Consumer Report and/or Investigative Consumer Report.

Law enforcement agencies and other entities often require the following information when checking records. It is confidential and will not be used for any other purposes. I hereby release PFCU and its employees, and/or agents and/or representatives, **VeriFirst Background Screening, LLC** and its employees, and/or agents and/or representatives and all person, agencies, and entities providing information or reports about me from any and all liability arising out of the request for or the release of any of the above mentioned information or reports.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Social Security Number

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Driver's License # and State Issued

**PLEASE PROVIDE ALL RESIDENTIAL ADDRESSES FOR THE PAST 5 YEARS**

\_\_\_\_\_  
Current Address

\_\_\_\_\_  
City and Zip Code

\_\_\_\_\_  
Since

\_\_\_\_\_  
Cell Phone

\_\_\_\_\_/\_\_\_\_\_  
Work Phone

\_\_\_\_\_/\_\_\_\_\_  
Home Phone

\_\_\_\_\_  
Previous Address (if applicable)

\_\_\_\_\_  
City and Zip Code

\_\_\_\_\_  
From / To

\_\_\_\_\_  
Previous Address (if applicable)

\_\_\_\_\_  
City and Zip Code

\_\_\_\_\_  
From / To

\_\_\_\_\_  
Previous Address (if applicable)

\_\_\_\_\_  
City and Zip Code

\_\_\_\_\_  
From / To



**DISCLOSURE AND AUTHORIZATION FORM**  
*Please Read Carefully Before Signing the Authorization*

In considering you to serve as a volunteer, Pioneer Federal Credit Union may request and rely upon one or more consumer reports or investigative consumer reports about you that we obtain from a consumer reporting agency.

**For explanation purposes:**

- a “consumer report” is a written, oral or other communication of any information by a consumer reporting agency bearing on your credit worthiness, credit standing, credit capacity, character, general reputation, personal characteristics, or mode of living which is used or expected to be used or collected in whole or in part for the purpose of serving as a factor in making a volunteer related decision about you. Such information may include, for example, credit information, criminal history reports, or driving records; and
- an “investigative consumer report” is a consumer report in which information on your character, general reputation, personal characteristics, or mode of living is obtained through personal interviews with your prior employers, neighbors, friends, or associates, or with others who may have knowledge concerning any such items of information. In the event an investigative consumer report is requested about you, you are entitled to additional disclosures regarding the nature and scope of the investigation requested, as well as a written summary of your rights under the Fair Credit Reporting Act (“FCRA”).

Under the FCRA, before Pioneer Federal Credit Union can obtain a consumer report, investigative consumer report or employer/nonemployer related insurance or fidelity bond claims information about you, we must have your written authorization. Before we take adverse action on the basis, in whole or in part, of information in the report, you will be provided a copy of that report, the name, address, and telephone number of the consumer reporting agency, and a summary of your rights under the FCRA.

**AUTHORIZATION**

I \_\_\_\_\_, have read and understand the foregoing Disclosure, and hereby authorize Pioneer Federal Credit Union to obtain and rely upon consumer reports, investigative consumer reports, public government records and information regarding my involvement in any prior employer/nonemployer related insurance or fidelity bond claims in considering me as a volunteer to serve on the Board of Directors or Supervisory Committee.

By my signature below, I authorize Pioneer Federal Credit Union to obtain at their own cost and expense any such reports and information from third-party entities such as consumer reporting and insurance agencies and to share the reports and information received with any person involved in the decision about me.

Further, I \_\_\_\_\_, do \_\_\_\_\_ do not \_\_\_\_\_ authorize Pioneer Federal Credit Union at this time to contact my Reference Verifications.(if applicable) I also agree that this Disclosure and Authorization in its original, faxed, photocopied, or electronic (including electronically signed) form shall be valid for any consumer reports, investigative consumer reports, public record search, and employer/nonemployer-related insurance or fidelity bond claim reports that may be requested about me by or on behalf of Pioneer Federal Credit Union.

\_\_\_\_\_  
Applicant/Volunteer Signature

\_\_\_\_\_  
Date