

2023 Basic Information Survey Worksheet



CREDIT UNION INFORMATION			
CU Name:			
CU City, State Zip:			
CU Phone:		CU Web URL:	
Charter Number:	Charter: <input type="checkbox"/> State <input type="checkbox"/> Federal	Federally-Insured: (Y/N)	
Common Bond:		List States (if multi-state):	
List Type of CUSO(s), if any:			
BOARD OF DIRECTOR'S INFORMATION			
Board Chair's Name:			
Board Chair's Email:			
Board Chair's Mobile #:			
# Years as Chair:	# Board Directors:	# Associate Directors:	Term Limits (Y/N)
FINANCIALS			
	As of June 30, 2022	As of June 30, 2023	
To complete this section, refer to NCUA 5300 Reports			
CUSO INVESTMENTS in millions	\$	\$	
Total ASSETS in millions	\$	\$	
Total LOANS in millions	\$	\$	
Total MEMBERS			
NET WORTH Ratio <i>(5300 Report Schedule G, Sec. 4.1)</i>			
LOAN-TO-SHARE Ratio <i>(Total Loans ÷ Total Shares + Deposits)</i>			
RETURN ON ASSETS <i>(Annualized Net Income ÷ Average Total Assets)</i>			
ASSET QUALITY <i>(Delinquencies + Charge-Offs)</i>			
EFFICIENCY Ratio <i>(Non-Interest Expense ÷ Revenue)</i>			
NET INTEREST MARGIN Ratio <i>(Interest Income – Dividends Paid ÷ Avg. Total Assets)</i>			

SURVEY LINK: <https://www.surveymonkey.com/r/NACUC2023BIS>

Please submit data no later than Friday, September 22