

Form 6300 – Merger Plan Document Checklist

- Merger Application – Form 6301
- Resolution of Continuing Board – Form 6302
- Resolution of Merging Board – Form 6303
- Notice of Special Meeting (proposed) Form 6305 – Attach letter accompanying Notice to members
- Ballot for Merger (proposed) – Form 6306
- Continuing Credit Union Share Ratio – Form 6311
- Merging Credit Union Share Ratio – Form 6312
- Combined Share Ratio – Form 6313
- Consolidated Financial Statement - Form 6310
- Continuing Credit Union Delinquency Summary
- Merging Credit Union Delinquency Summary
- Continuing Credit Union Financial Statement
- Merging Credit Union Financial Statement
- Current analysis of the adequacy of the Allowance for Loan & Lease Losses Account
- Proposed Merger Agreement –Form 6304

After completion of the above, your merger plan is ready to submit to the Credit Union Division. After preliminary approval is received from the Division and NCUA, you may schedule your membership meeting. The following documents shall be submitted to the Division at least one week in advance of meeting notice & ballot going out to members.

- Notice of Meeting (actual) – Form 6305
- Ballot for Merger (actual) - Form 6306
- Any communication, with regard to the merger, to members including comparable loan and deposit rates and any added or discontinued services

After the completion of the membership vote, you shall submit the following documents for completion of merger.

- Certification of Vote - Form 6308
- Completed Merger Agreement - Form 6304
- Certification of Completion – Form 6309
- Bonding Company's Letter of Consent to Extend Coverage
- Continuing Credit Union Financial Statement
- Merging Credit Union Financial Statement

- Consolidated Financial Statement – Form 6310
- Merging Credit Union's NCUA/Iowa Insurance Certificates