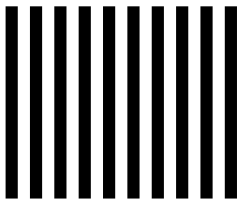


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CREDIT UNION  
P.O. Box 50738  
Indianapolis, IN 46250  
317.558.6000  
www.forumcu.com



FORUM Credit Union's **Save It Up** Program was created to encourage better saving and spending habits and to promote financial wellness. Don't worry, you don't have to do it alone; we'll be here to help you every step of the way!

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# SaveltUp Form

**The Challenge:** Complete at least one item from each of the categories listed below and receive a small gift for your success. And, if you earn a total of at least 75 points, **you'll be entered to win \$2,500!** Plus, if you complete every item in every category, we'll double your prize, that's a potential for \$5,000. All we ask is that you provide us with a little "proof." Program ends October 31, 2009.



## Budget:

- Evaluate current spending habits by writing down your monthly bills and expenses *(5 points)*
- Create a realistic budget to help areas where you need to make a change *(10 points)*
- Sign up for Bill Pay to help track payments *(10 points)*
- Open a Santa Savings or Weekly 5 Club with direct deposit to create regular saving habits *(20 points)*
- Other \_\_\_\_\_ *(5 points)*

## Thrift:

- Start clipping coupons or using online coupon codes *(5 points)*
- Eat at home at least 1 more time per week *(2 points)*
- Have at least 5 merchant loyalty cards that help you save money where you shop *(5 points)*
- Open a Rewards Checking account to earn money for signature based debit card transactions *(15 points)*
- Other \_\_\_\_\_ *(2 points)*

## Savvy:

- Turn your heat or air conditioning down/up when no one is home *(2 points)*
- Apply to become a featured saver on our website *(10 points)*
- Open a CommonCents account to save money every time you use your debit card *(10 points)*
- Post a comment on our **SaveltUp** blog to share your savings tips and stories *(5 points)*
- Other \_\_\_\_\_ *(2 points)*

## Goals:

- Reduce credit card spending or pay off balances every month *(10 points)*
- Share your goals with a FORUM Representative/Financial Coach so they can help keep you on track *(15 points)*
- Increase your retirement savings or open an Individual Retirement Account *(20 points)*
- Set and meet a dollar amount you would like to save during the challenge *(15 points)*
- Other \_\_\_\_\_ *(10 points)*

## Education:

- Attend a money management class or seminar *(10 points)*
- Receive a free credit report and analysis from your FORUM Financial Coach *(10 points)*
- Sign up to receive FORUM's "Savings Tip of the Week" *(5 points)*
- Subscribe to or read an online money magazine or blog *(5 points)*
- Other \_\_\_\_\_ *(5 points)*

Visit [www.SaveltUpChallenge.com](http://www.SaveltUpChallenge.com) for more savings tips and contest details.

Name \_\_\_\_\_

Phone \_\_\_\_\_

Address \_\_\_\_\_

City/St/Zip \_\_\_\_\_

Challenge Start Date \_\_\_\_\_

Total Points Earned \_\_\_\_\_

Financial Coach \_\_\_\_\_

Personal Savings Goals \_\_\_\_\_

Savings Goals Met \_\_\_\_\_

Comments about your experience taking the **SaveltUp** Challenge:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How did you hear about **SaveltUp**?

Television

FORUM Website/Online

FORUM employee \_\_\_\_\_

Friend or family member

Other: \_\_\_\_\_