

# 2025 Basic Information Survey Worksheet



**Please do not submit this worksheet to NACUC.**  
**Once you have filled in the fields, use the link at the bottom of this sheet to submit your data.**

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, 2024	As of June 30, 2025	
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 (5300 Report Schedule G, Sec. 4.1)			
LOAN-TO-SHARE Ratio (Total Loans ÷ Total Shares + Deposits)			
RETURN ON ASSETS (Annualized Net Income ÷ Average Total Assets)			
ASSET QUALITY (Delinquencies + Charge-Offs ÷ Total Assets)			
EFFICIENCY Ratio (Non-Interest Expense ÷ Revenue)			
NET INTEREST MARGIN Ratio (Interest Income – Dividends Paid ÷ Avg. Total Assets)			

**SURVEY LINK:** <https://members.nacuc.org/ap/Form/Fill/LwOWgTgr>

**BIS DEADLINE: FRIDAY, SEPTEMBER 26**