

# “L-U-S-O”

## In-school banking program

We are excited to offer “L-U-S-O” (Luso’s **U**ltimate **S**avings **O**ppportunity) program to the students at Thornton Burgess Middle School! We are thrilled to have the opportunity to partner with your school to help students learn about the importance of developing good savings habits!

As a local community based **not for profit** financial institution, LUSO Federal Credit Union strives to provide the best in member financial services to all who live, work, worship or attend school in Hampden County; this is the objective behind our in-school banking program.

**Complete the attached form ONLY if your child is NEW to our program**

### Students will receive:

- A blue banking bag to bring their deposit to school.
- A **free** account opening gift. Your choice of a Flash drive on a lanyard **or** a power pod to charge your electronic devices
- \$5.00 opening deposit, courtesy of LUSO.\*
- “L-U-S-O” passbook and deposit envelopes.
- With each deposit made, your student will be entered to win a \$10.00 gift card each week!

### How in school banking works:

- A Credit Union representative will be at Baird every Friday, beginning September 16th at 7:30 a.m. to accept deposits.
- Each visit, a Credit Union representative will update the student’s passbook which eliminates the need for paper receipts.
- Each month the student will receive a statement at his or her home address showing account activity.



If you would like additional information or have questions about our school banking program, please contact Kim Anderson at 1-413-589-9966 ext. 131 or [kanderson@lusofederal.com](mailto:kanderson@lusofederal.com)

\* Account must remain open for a minimum of 90 days or account opening deposit will be forfeited.

**We value our members privacy. All account and personal information is handled confidentially.**



**Branch locations: 1-3 Crane Park, Suite 4, Wilbraham, MA or 599 East Street, Ludlow, MA**

# L-U-S-O STATEMENT SHARE ACCOUNT AGREEMENT

## FOR CREDIT UNION USE ONLY

### STUDENT INFORMATION

Member (1) Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone Number: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

School Name: Thornton Burgess Middle School

Grade Level: 05 06 07 08

Parent or Guardian Signature: \_\_\_\_\_

### JOINT ACCOUNT HOLDER

Signer (2) Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

License Number: \_\_\_\_\_ Expiration Date: \_\_\_/\_\_\_/\_\_\_

License Issue State: \_\_\_\_\_ Issue Date: \_\_\_/\_\_\_/\_\_\_

Telephone Number: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Business Tel: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Signature of Joint Applicant: \_\_\_\_\_

### "SAVINGS IS FUN" STATEMENT SHARE ACCOUNT

\$5.00 Minimum Deposit

Minimum Tier	Maximum Tier	Dividend Rate	APY
\$5.00	Unlimited	0.10%	0.10%

APY: Annual Percentage Yield / Fee FREE account!

Requires statement account processing.

Account must remain open for a minimum of 90 days or the \$5.00 complimentary account opening deposit will be forfeited.

This is a variable rate account and rates are subject to change. Please visit our website, [www.lusofederal.com](http://www.lusofederal.com), to review current rates.