



It is important to us that you feel confident in your membership with Serve Credit Union. This confidence comes from having goals in mind and understanding the steps you/we need to take to reach those goals.

Member Name: _____ Member #: _____

My Goals are:

Target Date:

Why are these goals important to me?

What obstacles have/could I encounter to stop me from reaching my goals?

What can Serve Credit Union do to help me reach my goals?

(See full list of deposit, lending, convenience, and value add products and services)

Most importantly...how will I celebrate when I've reached my goals or a milestone?