



Member Information Release

Welcome to BALANCE. We look forward to working with you to help you achieve your financial goals. At BALANCE, we protect the privacy of our clients. In some cases, however, our clients will request that we share details of their counseling session with their referring credit union in order to qualify for certain special programs. If you will need your information released to your credit union, please let your counselor know when you call for service. The BALANCE Toll Free Number is 888-456-2227. **This release form is for the Workout Loan Program for San Diego County Credit Union.**

Please let your counselor know you are calling for the "Workout Loan Program Counseling" for San Diego County Credit Union.

1. The information may be released to the following:

San Diego County Credit Union

Attn: Workout Loan Committee

By Email to balanceworkoutloan@sdccu.com

Primary Contacts

For real estate loans:
Karen Scanlan, AVP
858-597-6587 (phone)
858-597-4665 (fax)

For consumer loans:
Andrea Reza, AVP
858-597-6569 (phone)
858-597-6574 (fax)

2. **Counseling Program: Workout Loan Program Counseling** (Please check all loan types under review for this member☺)

- Credit Card(s)
- Unsecured Loan/LOC(s)
- Vehicle Loan(s)
- Real Estate/Mortgage Loan(s)

Description of workout:

Instructions:

Member will complete a budget counseling session with BALANCE for the San Diego County Credit Union Workout Loan program. Contact BALANCE to schedule an appointment at 888-456-2227. (Note: if the member's phone numbers are provided, BALANCE will place a call to the member to discuss an appointment. However, it is important to note that the member is responsible for ensuring that an appointment is scheduled).

San Diego County Credit Union staff will explain the information needed to conduct the budgeting session including gathering information on income/expenses using the **BALANCE Personal Financial Assessment** form. The completed form along with this signed Member Release form will be provided to BALANCE by San Diego County Credit Union.



3. I authorize BALANCE to release information covered in my counseling session to my credit union. This information may include details of my income, expenses, current debts and action plan notes discussed and prepared by BALANCE.

Member name (please print) _____

Member Phone (home) _____ (work) _____ (cell) _____

Member Current Address _____ City _____ St _____

Member signature _____ Date _____

**Please email this completed form along with the member's Personal Financial Assessment to:
BALANCE, Attention: Bridget Arroyo and Ray Easter, Email: balancemanager@balancepro.org.
Or By Fax to 415-777-4065**

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