

Bank on San Francisco
Product Development Criteria
 June 2006

Bank or Credit Union Name: _____

Name of person completing survey: _____

Name of Starter Product: _____

| Required product feature | Currently Offered | Under Development | Unable to Offer |
|---|--------------------------|--------------------------|------------------------|
| Acceptance of Matricula consular ID as primary ID | | | |
| Acceptance of Guatemalan consular ID as primary ID | | | |
| Account available for person with NSF/OD history on ChexSystems over 1 year old | | | |
| Account available for person with NSF/OD history on ChexSystems less than 1 year old with financial management training | | | |
| Waiver of one set of NSF/OD fees per year | | | |
| No monthly minimum balance requirement | | | |

We hope to have 500 or more people complete financial management training classes in the first year of the program. Can your institution offer a \$50 savings account bonus (withdrawal restricted OK) to qualified financial management class graduates?

If not, would your institution be able to implement such a program if money was provided by another institution or foundation? _____

Would your institution consider funding other banks and credit unions that could not fund such a program on their own? _____