



WESTERN CATHOLIC UNION



APPLICATION FOR NOMINATION TO THE BOARD OF TRUSTEES NATIONAL CONVENTION ON AUGUST 7, 2020

Instructions--Please complete this form and mail it to: Western Catholic Union, Attn: Credentials Committee, 510 Maine St., Quincy IL 62301. Please include a signed Statement of Conflict of Interest form (last page). Article 2, Section 6 of the Bylaws require that a prospective candidate submit his or her name on or before April 9, 2020, which is 120 days prior to the convention, in order to be eligible for Board election at the 2020 National Convention. If the completed application is submitted by U.S. mail, the date of the postmark will be the date of submission. If it is submitted by other means, the date of receipt in the Home Office will be the date of submission.

Trustee Candidate Criteria for Western Catholic Union (WCU)--

- a. Be Catholic;
- b. Be between the ages of 21 and 76, inclusive, prior to the date of election;
- c. Be a benefit member of WCU in good standing (must own an active Annuity or Life certificate);
- d. Have a general knowledge of the fraternal benefit system and the history, customs and structure of WCU (candidates possessing experience in one or more of the following areas – Actuary, Insurance Regulation, Insurance Company Management, Audit are preferred);
- e. Have affirmed willingness to participate in educational seminars and programs that provide regular instruction in life insurance and/or financial services organization management issues;
- f. Have no criminal history other than matters determined insignificant by the Credentials Committee, such as a minor traffic violation;
- g. Have provided all information required by the Credentials Committee no later than 120 days prior to the meeting of the National Council and have not intentionally submitted false or misleading information;
- h. Is not a current or former employee of WCU or individual holding a sales contract with WCU (“Disqualified Person”), except that a former employee or individual holding a sales contract with WCU shall not be a Disqualified Person for election at the 2nd regular meeting of the National Council following end of employment or contract with WCU; and
- i. Is not the spouse of a Disqualified Person;

Please type or print all information on the following pages. The Credentials Committee will inform you whether it has verified that you meet the requirements to be a candidate and certified you as a candidate.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Contact information with area code:

Office: _____ Home: _____

Mobile: _____ Fax: _____

E-mail: _____

Name and Location of Branch: _____

Western Catholic Union (WCU) Certificate Number(s): All candidates must own a WCU product prior to certification for election as Trustee.

Are you Catholic? _____

Education: _____

Current Occupation, Employment History, Business Experience & Training:

WCU Branch Activities: _____

Parish Activities: _____

Service Club or Professional Memberships: _____

Please describe any criminal history, other than minor traffic violations:

CONFLICT OF INTEREST QUESTIONNAIRE

Name: _____

Are you an Officer, Director, or Stockholder of any other company engaged in the business of selling, promoting or otherwise serving, or serving in some official capacity for any insurance company?

If so, please disclose nature and capacity of connection with such other company or companies, and nature and extent of any aforesaid interest in such other companies including salary or fees, if any, and stock interest.

In your opinion, do any of these aforementioned connections and/or interests conflict with the interest of this company?

Please disclose nature and extent of any interest or activity not already mentioned which may or might be deemed to conflict with the company's interest.

Do you believe there is any actual conflict of interest? _____

By signing, I certify that the above information is true and correct to the best of my knowledge and belief.

Signed this _____ day of _____, 2020

Signature of Prospective Trustee Candidate