

Date: \_\_\_\_\_

Financial Institution Name: \_\_\_\_\_

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

Contact name: \_\_\_\_\_

Contact phone #: \_\_\_\_\_

Contact email: \_\_\_\_\_

(1) New to instant issuance or upgrading current instant issuance platform?

- New                       Upgrade from \_\_\_\_\_

(2) Anticipated installation timeframe:

- 1 – 6 months                       More than 1 year  
 7 – 12 months                       Just shopping

(3) Has this project been budgeted?

- In our budget for \_\_\_\_\_/\_\_\_\_\_ (quarter/year)  
 Gathering costs for budgeting purposes

(4) How many?                      Branches \_\_\_\_\_                      Card printers \_\_\_\_\_

(5) Number of PIN pads needed? \_\_\_\_\_ (# of estimated end-user workstations)

(6) Style of cards to be printed?                       Flat card                       Embossed

(7) Types of cards to be instantly issued:

- ATM  
 Debit                       Visa                       MasterCard                       Discover  
 Credit                       Visa                       MasterCard                       Discover  
 In-house                       Offline                      If Offline, which processor? \_\_\_\_\_  
 Other \_\_\_\_\_

(8) Core system platform:

- |  |   |
|--|---|
| <input type="checkbox"/> CIF 20/20     | <input type="checkbox"/> SilverLake       |
| <input type="checkbox"/> Core Director | <input type="checkbox"/> Spectrum         |
| <input type="checkbox"/> Corelation    | <input type="checkbox"/> Spectrum ASP     |
| <input type="checkbox"/> CU Prodigy    | <input type="checkbox"/> Symitar - Epysis |
| <input type="checkbox"/> Fiserv DNA    | <input type="checkbox"/> _____            |
| <input type="checkbox"/> Fiserv XP2    |   |

(9) Card processor interfaces needed:

- |   |                                 |                                |                               |
|---|---------------------------------|--------------------------------|-------------------------------|
| <input type="checkbox"/> CO-OP (Efunds)                 | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> ELAN                           | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> First Data – Wilmington (Star) | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> FIS (Cerategy / Fidelity)      | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> Fiserv EFT/Card Services       | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> JHA Passport / CPS (Pemco)     | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> Mastercard IPS                 | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> Postillion                     | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> TMG (First Data – Omaha)       | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> Vantiv                         | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> Visa DPS                       | <input type="checkbox"/> Credit | <input type="checkbox"/> Debit | <input type="checkbox"/> Both |
| <input type="checkbox"/> _____                          |                                 |                                |                               |
| <input type="checkbox"/> _____                          |                                 |                                |                               |

Additional notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_