



## LOCKBOX RESEARCH REQUEST

Please provide the following information so that we may quickly and accurately process your request. In some cases, a Customer Service Associate may contact you via phone or email to clarify your request. If you need assistance filling out this request, please call 888-237-0182, Monday through Friday, 11:00 a.m. – 8:00 p.m. ET/ 8:00 a.m. – 5:00 p.m. PT, excluding federal holidays, and a Customer Service Associate will be happy to assist you. For improved service, please submit one inquiry per request.

### Step 1: Enter Your Account Information

*\* Required field*

Please indicate if you are a (select one):  Property Management Company  Self-Managed Association

\* Send request to: (select one):  Northern California Processing  Southern California Processing

\* Property Management Company Name: \_\_\_\_\_

\* Association Name: \_\_\_\_\_

\* Contact Name: \_\_\_\_\_

\* Union Bank Account Number: \_\_\_\_\_

\* Telephone: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Ext: \_\_\_\_\_

\* Fax: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

\* Email: \_\_\_\_\_

### Step 2: Enter Lockbox Research Request

\* What is your Request? *For improved service, please submit one inquiry per request.*

Date of Transaction: \_\_\_\_\_

Amount of Daily Deposit: \$ \_\_\_\_\_

Check Number: \_\_\_\_\_

Amount: \$ \_\_\_\_\_

Unit ID: \_\_\_\_\_

Homeowner Name: \_\_\_\_\_

### Step 3: Submit Lockbox Research Request

Save and submit this request to [OCSG-LOCKBOX-MPHOA@unionbank.com](mailto:OCSG-LOCKBOX-MPHOA@unionbank.com)