

## Unincorporated Associations, Groups/Teams/Clubs

### Business Account Opening

Select your branch preference:  Cranbrook  Elkford  Fernie  Sparwood  
 Castlegar  Slocan Valley  West Boundary

We understand that your time is valuable and in order to process your account opening request as quickly and efficiently as possible we ask that you review the instructions outline and provide the information requested on this form.

- Completed form can be forwarded to StellerVista CU via e-mail at [commercial.support@stellervista.com](mailto:commercial.support@stellervista.com) with all the required documentation.
- Completed form can be dropped off at our branches or mailed with all the required documentation
- Forms and information are available on our website at [www.stellervista.com](http://www.stellervista.com)

**StellerVista CU is member owned; a \$5 Personal Equity Share deposit is required which will stay with the account until such time that the account is closed. All signers are personally liable to StellerVista for all account activity for this account.**

To open an Incorporated organization account, the following information and documentation is required in order to comply with all Legislative and Credit Union policies.

#### 1) The following will be required:

- Documentation that proves the organization exists (copy of bylaws, meeting minute or attestation form)
- All signers on the account must be members of StellerVista Credit Union. All signers are personally liable to StellerVista for all account activity for this account.
- There should be a **minimum of Three signers** on the account.

#### 2) Provide us with the following information on the Unincorporated Association, Group, Team or Club:

<b>Name of Group/Team/Club</b>			
<b>Business Address:</b> Mailing Civic City, Postal Code			
<b>Business Phone Number:</b>			
<b>Business Email Address:</b>			
<b>Nature/Purpose of the Group, Team, Club:</b>			
<b>Intended use of account(s):</b>			
<b>Primary Contact Name:</b>			
<b>Phone #:</b>		<b>Email:</b>	

3) Provide us with the following personal information for each of the account signers; if more than three, please add an additional form. Individual signers may provide information directly to [commercial.support@stellervista.com](mailto:commercial.support@stellervista.com) if they prefer.



	Signer #1	Signer #2	Signer #2
<b>Legal Name:</b> First			
Middle Name	<input type="checkbox"/> No Middle Name	<input type="checkbox"/> No Middle Name	<input type="checkbox"/> No Middle Name
Last Name			
<b>Address (Civic address):</b> Street City, Postal Code			
<b>Mailing Address (if different):</b>	<input type="checkbox"/> Same as above	<input type="checkbox"/> Same as above	<input type="checkbox"/> Same as above
<b>Birth Date (mm/dd/yyyy)</b>			
<b>SIN</b>			
<b>Contact Number:</b> Home Work Cell			
<b>Email Address</b>			
<b>Occupation</b>			
<b>Access to Online Banking?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Please indicate the accounts required:

Chequing	Saving	Investments	USD Chequing
<input type="checkbox"/> Servis Plus <input type="checkbox"/> ElectroLink Business	<input type="checkbox"/> Super Saver <input type="checkbox"/> Member Advantage	<input type="checkbox"/> GIC /Term Deposits <input type="checkbox"/> Accumulator	<input type="checkbox"/> USD Chequing

Signatories	Online Banking	ATM	Night Deposit	Cheques
All accounts will be set up with <b>two to sign</b> .	All account will be set up with the two to sign restriction.	Access to the account(s) to deposit to the account using a debit card. <input type="checkbox"/> Yes <input type="checkbox"/> No ATM cards will not be issued for withdrawals	Expect to use night deposit facilities <input type="checkbox"/> Yes <input type="checkbox"/> No	Will need to order cheques <input type="checkbox"/> Yes <input type="checkbox"/> No

**CHECKLIST: HAVE YOU SUBMITTED THE FOLLOWING INFORMATION?**

We require by law to verify the existence of your association or club. If you do not have a formal structure, any one or more of the following items may satisfy this requirement:

- Meeting Minutes where a motion was passed authorizing the opening of bank accounts and listing the names of the appointed signing officers for the account. Minutes need to be dated and signed; or a letter from the society stating they want to open a bank account and listing the signing authorities; or completion of the unincorporated association attestation form
- List of the names of Directors and officers of the group or association and their titles
- List of association members or sports club roster of coaches and players names
- Copies of promotional/media brochures, marketing materials, official correspondence (eg, facility leases)
- Completed and signed Consent form (Consent forms are available via [www.stellervista.com](http://www.stellervista.com) or at branch)
- two pieces of copied Valid ID from each signer (Make copies as necessary). Information can be sent to [commercial.support@stellervista.com](mailto:commercial.support@stellervista.com) directly if they prefer.