

## Incorporated Societies and Co-operatives

### Business Account Opening

**Select your branch preference:** ☐ Cranbrook ☐ Elkford ☐ Fernie ☐ Sparwood

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. The form can be:

- Completed, saved with your Association, Group, Team or Club name and then forwarded to StellerVista via e-mail with the required documentation to [Commercial.Support@ekccu.com](mailto:Commercial.Support@ekccu.com)
- Completed and printed and then dropped off or mailed with the required documentation.
- Forms and information are available on our website at: [EKCCU.COM](http://EKCCU.COM)

StellerVista is member owned; a \$5 share deposit is required and will stay with the account until such time that the account is closed.

To open a **BC Registered Society or Co-operative** business 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:

- Proof of Incorporation (Eg. Certificate of Incorporation)
- Copy of Constitution and Bylaws
- Directors Registry
- List of All Directors
- Proof of Charity Registration (if applicable)

#### 2) Provide us with the following information about your Incorporated Society/Corporation:

<b>Legal Name of Society/ Co-operative:</b>			
<b>Business Address:</b> Mailing Civic City, Postal Code			
<b>Business Phone Number:</b>			
<b>Web Site/Email Address:</b>			
<b>Are donations being solicited from the public:</b>	<input type="radio"/> Yes <input type="radio"/> No		
<b>Canadian Registered Charity number (if applicable):</b>			
<b>Nature/Purpose of the Society:</b>			
<b>Primary Contact Name:</b>			
<b>Phone #:</b>		<b>Email:</b>	

**3) Please provide us with the following personal information for each of the account signers; if more than three please add an additional form.**

	Signer 1	Signer 2	Signer 3
<b>Member #</b>			
<b>Legal Name:</b> (Must match Primary ID) <b>First Name</b>			
<b>Middle Name</b>	<input type="checkbox"/> No Middle Name	<input type="checkbox"/> No Middle Name	<input type="checkbox"/> No Middle Name
<b>Last Name</b>			
<b>Home Address:</b> Mailing Civic City, Postal Code			
<b>Birth Date:</b> (mm/dd/yyyy)			
<b>Contact Numbers: Home</b>			
<b>Work/Cell</b>			
<b>Email Address</b>			
<b>Occupation:</b>			
<b>Online Banking Access?</b>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

**Operating accounts that are most appropriate for your needs:**

Please indicate the account types required:

Chequing	Saving	Investments
<input type="checkbox"/> Service Plus Account	<input type="checkbox"/> Business Savings	<input type="checkbox"/> Term Deposits
<input type="checkbox"/> Strictly Business (operating account)	<input type="checkbox"/> Member Advantage	
ElectroLink Business		

**Access to your accounts**

Signatories	Online Banking	ATM	Night Deposit	Cheques
All accounts will be set up with two to sign.	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?**

- ☐ Proof of Incorporation (E.g. Certificate of Incorporation)
- ☐ Copy of Constitution and Bylaws
- ☐ Directors Registry
- ☐ List of All Directors and Officers
- ☐ Charity Registration (if applicable)
- ☐ \$100 cheque made payable to your organization's name
- ☐ Completed and signed Consent form for each director/signer (additional copies [here](#))
- ☐ Two pieces of copied ID for each director/signer (Make copies as necessary)
- ☐ Forms completed in full