

Community Organizations



Checklist for Opening New Accounts

- Drop off a copy of recent meeting minutes. These minutes need to include:
 - names of each person who can sign
 - titles of each person who can sign (e.g. president, treasurer, secretary, etc.)
 - list of club members
 - description of who makes decisions for the club (do all members vote or just the signers decide)
(We can provide you with a Minutes Template if that would be helpful)
- We will prepare the forms and call you when they are ready – this may take a day or two
- Your signers will need to:
 - come in person to sign
 - bring their ID
 - be prepared to answer extra questions:
 - what is the club mailing address & street/legal address?
 - statement options – paper or online?
 - do you want/require MemberDirect access?
 - Cheques – 1 or 2 signature lines

Checklist for Changing Signing Authorities

- Drop off a copy of the meeting minutes when the signing authorities changed. These minutes will include:
 - names of each person who can sign
 - titles of each person who can sign (e.g. president, treasurer, etc.)
 - list of club members
 - description of who makes decisions for the club (do all members vote or just the signers decide)
(we can provide you with a Minutes Template)
- We will prepare the forms and call you when they are ready – this may take a day or two
- Your new signers will need to:
 - bring their ID
 - come in person to sign
 - be prepared to answer extra questions:
 - club mailing address
 - statement options
 - MemberDirect