

# Unincorporated Organization: Credit Union Account – Minutes Template

(for Opening Account(s), Changing Signing Authorities or Other Updates - organizations, associations, teams, groups, clubs etc.)

*For new accounts, complete the entire form.*

*For existing accounts, complete only the information which is changing along with the certification in paragraph 6. For example, if signing authorities are changing, complete paragraphs 5 and 6. If the decision makers (board/committee) have changed along with a change to signing authorities, complete paragraphs 3, 5 and 6.*

## 1. Name and Purpose of Organization

Name of Organization: \_\_\_\_\_

Mailing Address (street or legal description, if different):  
\_\_\_\_\_

Phone Number (for contacting organization representative): \_\_\_\_\_

Business or Purpose of Organization: \_\_\_\_\_  
\_\_\_\_\_

## 2. Authorization to Open Account(s) at Credit Union

The above named Organization is authorized to open a deposit account(s) at \_\_\_\_\_ Credit Union (the "Credit Union").

## 3. Decision Makers/Committee/Board (Control and Structure Information)

Does decision making group consist of 4 or less people?  No  Yes

The following individuals are the decision makers (board/committee) responsible for the operation and control of the Organization (not just the Credit Union accounts):

Position/Title:	Name (and Address where 4 or less decision makers, including street address or legal description if different):
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**4. Authority to Open Account(s)**

Any two of the following individuals (full legal names and positions, for example, President, Vice-President, Treasurer, Secretary, Team Manager, etc.) are authorized together to sign the contract documents in order to open accounts for the Organization at the Credit Union:

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

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

Position: \_\_\_\_\_

Position: \_\_\_\_\_

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

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

Position: \_\_\_\_\_

Position: \_\_\_\_\_

**5. Signing Authority on Account(s)**

The following individuals will have authority to sign cheques and other transactions on the accounts once opened:

Same as in Part 4 above; or:

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

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

Position: \_\_\_\_\_

Position: \_\_\_\_\_

(Each signing authority will need to attend at the Credit Union to present identification prior to being allowed to sign on the account)

**Specify the process, (i.e. whether two will be required to sign on each cheque or otherwise)\*:**

Two of them to sign together; or  Other: \_\_\_\_\_  
\_\_\_\_\_

\*Where more than one to sign is specified, this is for the Customer's own internal control purposes only and the Credit Union may honour and rely and act upon only one authorized signature.

**6. Certification**

We certify that the above was approved by the Decision Makers of the Unincorporated Organization at a meeting on \_\_\_\_\_, 20 \_\_\_\_\_ (Where possible, this document should be signed by two board/committee members listed in paragraph 3 but who do not hold the positions listed in paragraph 4 above).

Per: \_\_\_\_\_  
(print name and sign)

Per: \_\_\_\_\_  
(print name and sign)

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
(signature)

- Note:**
- Also provide credit union with any other documents confirming existence and/or decision making structure of the organization (e.g. Articles of Association, letter from applicable league or governing body, etc.)
  - All signing authorities named in part 5 above will need to attend at Credit Union and be prepared to provide required identification.
  - **Consider:** does Organization rent a **Safety Deposit Box** at the Credit Union? If so and if the individuals authorized to have access are changing, obtain keys from those whose right of access is ending and complete a new Safety Deposit Box Lease EDF 4.008.