

# Unincorporated Organization: Credit Union Account – Minutes Template

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

## 1. Name and Purpose of Organization

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

Mailing Address: \_\_\_\_\_

Civic Address/Legal Description: \_\_\_\_\_

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

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

## 2. Board/Committee/Decision Makers (Control and Structure Information) The following individuals are the decision makers (board/committee) responsible for the operation and control of the Unincorporated Organization (not just the Credit Union accounts):

Full Legal Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Legal Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Legal Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Legal Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Legal Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Legal Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

## 3. Authority to Open Account(s) The individuals holding the following positions are authorized together to sign the contract documents in order to open accounts for the Unincorporated Organization at the Credit Union. Example: President, Vice-President, Treasurer, Secretary, Team Manager, etc.

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Specify the process, (i.e.: whether two will be required to sign or otherwise):

Any two of them to sign together;  Other: \_\_\_\_\_

## 4. Signing Authority on Account(s) The following individuals will have authority to sign cheques and other transactions on the accounts once opened (list full legal names of all the individuals who will have authority to sign cheques and other debits on the accounts):

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Full Name: \_\_\_\_\_ Position/Title: \_\_\_\_\_

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

Any two of them to sign together;  Other: \_\_\_\_\_

## 5. Member Card: The following Individual(s) authorized to hold a Member Card:

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

## 6. Digital Banking Access: The following Individual(s) authorized to hold Digital Banking Access:

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

## 7. Certification:

We certify that the above was approved by the Decision Makers of the Unincorporated Organization at a meeting on

\_\_\_\_\_, 20 \_\_\_\_

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 the Credit Union and provide 2 pieces of I.D.