

For Account Openings for the 2022/23 Season

NEW FOR THE 2022/23 SEASON

There will be **NO** in-person appointment bookings with the Leduc branch. The process will be completed remotely through an off-site branch. Failure to provide all information required to the Servus Credit Union contact will result in the account setup being delayed.

Servus Credit Union Contact: Jennifer MacNeill - Jennifer.MacNeill@servus.ca

1. Provide the following information to Jennifer MacNeill. Please cc treasurer@lmha.ab.ca in the setup email.
 - a. Full Team name. As assigned by LMHA
 - b. Full names of both account signatories
 - c. Cell phone numbers for both account signatories
 - d. Email address for both account signatories
 - e. Team Meeting Minutes (see below). Must be signed by TWO team members (parents) that are neither team staff nor account signatories.
 - f. Staff and Team Roster.
 - i. Use the HCR provided by the LMHA Administrator
 - g. Number of team cheques required
 - i. Cheques come in batches of 4, 12 or 50
 - ii. Any amount over 50 cheques will come at a cost to the team and should only be ordered later as required.

Once the information has been received by Servus Credit Union you will be contacted by a Servus Credit Union member to complete the account set up. Documents will be sent to both account signatories by email to sign and finalize the account.

Once the account has been opened, the accounts will include the following:

1. Starter checks (as requested in your submission email to the Servus Credit Union contact)
2. Deposit book (Provided by LMHA while quantities last)
3. One signer will be given view-only access to facilitate the printing of statements to provide to LMHA on a monthly basis (must be properly stated in the minutes).
 - a. Cheques will need to be picked up in person at the Leduc Branch once the account setup has been completed (and confirmed).

Please note: Teams will not be given access to send e-transfers. LMHA team account is for a two-to-sign account and e-transfers do not allow this policy to be followed.

Meeting minutes information required to open an account:

Please use the following statement for your meeting minutes (fill in the blanks):

“Signing officers will be _____ and _____. Both signers will be required to take money from the account and write cheques drawn from the account.

TEAM NAME will require the use of online banking to facilitate statement printing and bookkeeping. _____ will be designated as the online administrator and will have view only access.”