

For Account Openings for 2021/22 Season

PLEASE BE AWARE THAT WITH THE EVER-CHANGING COVID ENVIRONMENT THAT THE BELOW GUIDELINES ARE SUBJECT TO CHANGE. RESTRICTIONS COULD CAUSE A DELAY IN OUR ABILITY TO ACCOMMODATE REQUESTS

Appointments will be booked directly with the Leduc branch and attended in branch.

1. Appointments can be booked by calling 780 638 7418
2. All appointment will be booked by phone with a member of our staff to ensure timely follow up, proper booking and a verbal review of requirements to attend and complete the appointment
3. Appointments will only be booked for Tuesday-Friday only.
4. All appointments will be booked for an hour and a half for new accounts and for change of signers on existing accounts. Please allow enough time to attend the appointment

Upon appointment booking, the following requirements must be met in order to proceed. If any of the requirements are not met, the appointment will need to be rescheduled at a later date. There will be no partial completion of account openings/change of signing authorities.

1. All signers must attend the appointment at the same time.
2. All signers must have 2 pieces of valid ID with them in branch. One piece is required to be government issued photo ID.
3. A Copy of the team meeting minutes signed by 2 persons who are not to be signers on the account. Meeting minutes must state the names of the signers of the account, if view only access to online banking will be required and include a team roster.
4. \$1 contribution to the common share account if the account has not previously been opened.

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

1. Starter checks
2. Deposit book (if needed)
3. One signer will be given view only access to facilitate printing of statements to provide to LMHA on a monthly basis (if it has been properly stated in the minutes)

Meeting minutes information required to open account:

- Date and FULL Team name (*see info below regarding Team Names*)
- 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.”

- **As some accounts have already been opened - you may have to issue a name change as indicated by the LMHA Financial Administrator and this information will need to be included in your meeting minutes**