



FINANCIAL SERVICES AGREEMENT – BUSINESS

(Hereinafter called the "Credit Union")

Date: _____

Applicant Name: _____

Applicant Member/Org. No.: _____

Business Name (optional): _____ Member/Org. No.: _____

Business No.: _____

Principal Business: _____

Date of Incorporation (if applicable): _____ Entity No.: _____

Phone: _____
(Home) (Business) (Cell)

Fax: _____ Email Address: _____

Business Mailing Address: _____

Civic Address/Legal Description (if different): _____

Registered Office (if different): _____

Purpose/Intended Nature of Business Relationship: _____

Canadian Resident: ☐ Yes ☐ No If No, Country of Residence: _____

US Citizen/US Person (record if required): ☐ Yes ☐ No

Check applicable box:

- ☐ Corporation
☐ Sole Proprietor
☐ Partnership
☐ Unincorporated / Other
☐ First Nation

MEMBERSHIP APPLICATION AND SHARE SUBSCRIPTION

Check and complete where applicable:

- ☐ The Applicant is a member of the Credit Union;
☐ The Applicant wishes to apply for membership in the Credit Union and subscribe for the minimum number of membership shares required by the Credit Union. Membership shares are not guaranteed or insured by the Credit Union Deposit Guarantee Corporation;
☐ The Applicant does not wish to subscribe for membership shares.

SIGNATURE Where an electronic signature is available and used, the person using the electronic signature is adopting such signature and authorizes it to be attached to or associated with this document and any attachments or related documentation.

By signing this Agreement the Applicant:

1. Is requesting that the Credit Union provide financial services to it which may include but are not limited to the opening of a deposit account or accounts from time to time.
2. Acknowledges that when it requests an account be opened that it will be required to sign Account Opening and Signing Authorities documentation.
3. Certifies that the information provided in this Agreement is true and accurate.
4. If membership is applied for, agrees that the membership is subject to:
 - a. approval of the Board of Directors of the Credit Union or in the manner authorized by the Board of Directors;
 - b. *The Credit Union Act, 1998*, Regulations and any Bylaws of the Credit Union all as amended or enacted from time to time.
5. Authorizes the Credit Union to obtain, share and exchange information and, unless the Applicant has asked the Credit Union not to do so, use a social insurance or business number for credit matching purposes.
6. Acknowledges receipt of the Terms and Conditions for Financial Services and agrees that the Terms and Conditions as may be amended from time to time will apply to and govern the operation of its accounts with the Credit Union.

If Applicant is a Corporation/Unincorporated Organization/First Nation/Other:

Per: _____

Per: _____
(affix corporate seal, if applicable)

If Applicant is an Individual, Sole Proprietorship or Partnership:

Per: _____

Per: _____

CU USE ONLY – Copy of TERMS and CONDITIONS FOR FINANCIAL SERVICES given to Applicant:

Date

Employee Signature