Opening a new business account at Kawartha Credit Union

Business Trust Membership

Thank you for choosing Kawartha Credit Union for all of your Corporate account needs. Our goal is to exceed member service expectations, and provide you with financial solutions to encourage the growth of your business.

Step 1 - Documentation & Information Requirements:

Please complete the following for your Trust account, as an extension of your Business Membership Application:

❑ KCU Consent Form - Authorized Signatory (one for each Authorized Signatory)

❑ KCU Consent Form - Authorized User (one for each Authorized User)

In addition, the following supporting documents are required, based on the type of trust.

Lottery Trust

❑ Proof of valid Lottery Licence

KCU forms are available in-branch

Step 2 - Submit Documentation:

Visit any Kawartha Credit Union branch to drop off the completed checklist and required documentation. A Kawartha Credit Union Business Advisor will sit down with you to review the information, discuss your business needs and begin the application process. You will then be contacted within **3-5** business days with the status of your application.

Step 3 – In-Branch Appointment:

Once your Business Trust membership application has been approved, a final appointment (minimum of one hour) is required to sign the application and new account documentation. Signing officers must attend the appointment and provide 1 piece of valid photo ID.

Please note that Kawartha Credit Union is a member-owned co-operative. A $25 share deposit is required, which stays with the account until the account is closed.