

What to bring to your appointment to open a personal membership

Note: Your appointment may take up to an hour. For the reasons why, please visit the membership section of our website.

Do you have an appointment to open a personal membership at Westoba? Come prepared! Please use the list below to make sure you bring all the documentation and information you will need. Be sure to include these for all account owners. All account owners must be present at the appointment to open an account. We will return all of your documentation to you before you leave.

Personal Information:

- Full legal name
- Date of birth
- Current address
- Phone number(s)
- Email address (optional)
- Employment/Income information

Personal Banking Needs:

To help us get to know you and understand your needs so that we can find the right financial product(s) for you, please come prepared to talk about topics like the following:

- What would you like to use your account for?
- How many transactions will you need to make per month?
- How do you prefer to make those transactions? (Debit card? MasterCard? Online? Over the phone? In-person?)
- What account services will you need? (Cheques? Buyer protection and extended warranty plans? Automatic payments and pre-authorized debits? Line of credit? Overdraft protection? Other?)

Social Insurance Number Verification:

One of the following is required to verify your social insurance number:

- Social Insurance Number card
- Social Insurance Number document issued from Service Canada
- Notice of Assessment

Two Pieces of Identification:

One must be valid (non-expired) government-issued photo identification. Acceptable options include:

- Driver's license
- Passport
- Enhanced photo identification
- Permanent resident card
- Certificate of Indian Status
- Canadian Firearms License
- Military photo identification

The second piece may be either one of the above or one of the following:

- Major credit card
- Record of Landing (not more than five years old)
- Birth certificate

If you're not from Canada, the following foreign identification is acceptable:

- Valid foreign passport supported with driver's license

The following are not acceptable forms of identification to open an account: provincial health card, employee identification card.

Share:

Because members are all part-owners of Westoba, new members need to purchase a \$5 share.

- \$5.00



Questions? Call us or visit any of our branches.
westoba.com | 1-877-WESTOBA