

New Business Membership

CHECKLIST



COASTAL COMMUNITY
CREDIT UNION

Coastal Community Credit Union is here to assist in making your business or organization's new membership experience as easy and efficient as possible. Please take a few moments to review this checklist for opening a new membership:

- Assign a Designated Contact Person to facilitate the membership opening from start to finish.**

Coastal Community requests that all businesses/organizations opening a new membership **assign one signer** to be the Designated Contact Person.

- Have the Designated Contact Person review their role and responsibilities below:**
 - ✓ Will act as the liaison between the business and credit union for all communications and to ensure all requests are coordinated as efficiently as possible.
 - ✓ Ensure all signers are aware of:
 - Their role and responsibilities as signers – refer to the descriptions in this document: [Authorized Signatory versus Authorized User](#)
 - They will be contacted by the employee assisting with the new membership opening to facilitate completing their signer profile and consent form.
 - Inform all Authorized Signatories that a credit check will be completed.
 - The Designated Contact Person will inform all signers once the process is complete and the membership is active.
 - ✓ If prompted by the employee, assist in contacting signers to advise of next steps.
- Complete the [New Business Membership Request Form](#) and check for accuracy before returning it to your branch contact or preferred branch.**

If needed, fill out the [Appendix](#) and submit along with the complete request form.

- Gather the [Required Documents](#) appropriate for your business/organization type and provide to your branch contact or preferred branch.**
- Be prepared for your scheduled telephone appointment. The purpose of the telephone appointment is to:**
 - ✓ Review the requested membership opening with your branch contact.
 - ✓ To ask questions about your business membership application.
 - ✓ To be advised of next steps and what to expect during the membership opening process.