

Sole Proprietorship

A sole proprietorship is a business that is owned and operated by a single person.

Please provide us with the following documents for a seamless onboarding process:

Business Details Required:

Business address and Business mailing
address (if different)
Business phone number
Business email

If operating under a trade name:
Business Name Registration

Details of Sole Proprietor, Authorized Signatories¹, and Authorized Users² Required:

Full legal name
Government-issued photo identification
Employment information including
employment status, industry, occupation
Home address
Phone number
Email
SIN (Sole proprietor only)

¹ Authorized Signatory is someone the member has officially given permission to act for them when dealing with the Credit Union, like signing documents, setting up accounts, or making transactions

² Authorized User is someone the member has given permission to manage the account, like making transactions.

Additional details may be requested during the account opening process.

If you have any questions on what information or documentation is required, call us at +1 833-601-2728