

SOLE PROPRIETOR CHECKLIST

MEMBER(S) _____

APPOINTMENT DATE + TIME _____

At CreativeArts Financial, a division of FirstOntario Credit Union, we understand how valuable your time is. To assist with the opening of your membership, below is a list of documents we will require

SOLE PROPRIETOR MEMBERSHIP

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- ☐ A valid master business license, if operating under a name different from the owner's name.
- ☐ T1 General (tax return) Statement of business or professional activities (if applicable).

FOR ALL SIGNING AUTHORITIES

- ☐ One piece of valid identification.
- ☐ Drivers license, passport, (Other government Issued Photo ID's are acceptable, please inquire)
- ☐ Date of birth
- ☐ Full address
- ☐ Phone number, email address
- ☐ SIN (Social insurance number)

Additional documents may be requested.

If you have questions about the required documents, please call our branch at 1-866-800-2787.

This sheet is for information purposes only and does not signify formal approval.

REPRESENTATIVE: _____

BRANCH ADDRESS: _____

PHONE NUMBER: _____

ADDITIONAL NOTES: _____