

# Change of Signers Checklist

We'll be able to process your Change of Signers request quickly when you bring the documents and signers listed below for your business structure. All new signers attending a branch appointment will need to provide two pieces of ID, one of which must be a government-issued photo ID, and *may* be subject to a credit check.

## Corporations / Incorporated Societies / Strata Corporations

Individual making request	Required documents	Individuals required to be present
<b>Changing Director</b>	<p><b>For Limited Corporations</b></p> <p>Updated Notice of Articles <b>OR</b>, Notice of Change of Directors</p> <p><b>For Incorporated Societies</b></p> <p>Statement of Directors and Registered Officers</p> <p><b>For Strata Corporations</b></p> <p>Annual General Meeting minutes signed by at least two council members</p> <p><b>Along with:</b></p> <p><a href="#">Change to Authorized Signing Officers Form</a> signed by the current directors listed on membership</p> <p>Updated Beneficial Ownership Info (<i>if applicable</i>)</p>	The directors listed on the Notice of Articles who will be signers. If there is more than one director, a minimum of <b>two</b> need to attend.
<b>Changing Signers (non-directors) but the titles and positions are staying the same</b>	<a href="#">Change to Authorized Signing Officers Form</a> signed by the current directors listed on membership	New Signers
<b>Changing (non-directors) titles and positions</b>	<a href="#">Change to Authorized Signing Officers Form</a> and <a href="#">Resolution Appointing Signing Officers</a> signed by the current directors listed on the membership	New Signers

## Unincorporated Organizations

Individual making request	Required documents	Individuals required to be present
<b>Changing Sponsors*</b>	<a href="#">Change to Authorized Signing Officers Form</a> signed by current sponsors on the account  <b>OR</b> One of the following, signed by existing sponsors: Updated Meeting Minutes <b>OR</b> Letter from the governing organization	The two sponsors who will be on the membership going forward, must be present to complete the change ( <i>Note: We do not require sponsors/signers who have left to be present at the appointment</i> )
<p><i>*What is a sponsor? Since an unincorporated entity cannot become a member of the credit union in its own right, we require 2 active personal members to act as sponsors &amp; responsible parties for the entity, irrespective of their positions/ title on the account.</i></p>		
<b>Changing Signers (non-sponsors) but the titles and positions are staying the same</b>	<a href="#">Change to Authorized Signing Officers Form</a> signed by current sponsors on the membership	New Signers
<b>Changing (non-sponsors') titles and positions</b>	<a href="#">Change to Authorized Signing Officers Form</a> and <a href="#">Resolution Appointing Signing Officers</a> signed by current sponsors on the membership	New Signers

## Partnerships

Individual making request	Required documents	Individuals required to be present
<b>Changing Partners*</b>	Written notice from the partnership advising CCS of change in partners signed by existing partners  Updated Beneficial Ownership info ( <i>if applicable</i> )	All partners, who will be signers on the membership going forward, must be present to complete the change
<p><i>*If the change in the Partnership Agreement terminates the existing partnership, a new membership must be opened</i></p>		
<b>Changing Signers (non-partners)</b>	<a href="#">Change to Authorized Signing Officers Form</a> signed by existing partners	New Signers

## Sole Proprietorship

Changes to the sole proprietor are **not permitted**. If the sole proprietor is no longer operating the business, the membership must be closed.

**Note:** If another individual will be operating the sole proprietorship going forward a new membership must be opened. Refer to [Business Membership Opening](#) for detailed requirements.

## We're here to help.

If you have any questions or would like to book an appointment to change signers, simply visit a branch or contact us at [business@coastcapitalsavings.com](mailto:business@coastcapitalsavings.com) or 1.888.517.7000.