

Becoming a Member

What to Bring Checklist

Eligibility (one of the following):

- Live or work in one of the following Wisconsin counties - Winnebago, Outagamie, Fond du Lac
- Immediate family is a member including - spouse, parents, siblings, children, stepparents, stepchildren, grandparents, grandchildren, and relatives living in the same household
- Former member

All Parties on the Account:

- The membership share account requires a \$5 deposit
- Current photo ID including - government issued ID, driver's license, state ID, or passport. All forms of ID must be valid, expired documents will not be accepted
- Your Social Security number, date of birth, primary phone number
- Your current complete physical address and mailing address with some form of proof (i.e. photo ID, paystub, utility bill, medical bill, lease, insurance document, mortgage/lease document)

Youth Accounts:

- \$5 to match the deposit into a share account
- Social Security number with one of the following - birth certificate, Social Security card, or passport

Specialty Accounts

Trust Account:

- Letter of Instruction and/or Certification of Trust/Trust Certificate

Estate Account:

- Death certificate of individual in which estate is being opened
- Certified copy of Domiciliary Letters or Letters of Special Administration - Court document that appoints a personal representative(s) for the estate
- EIN Letter from the IRS

Guardianship Account:

- Certified Letters of Guardianship of the Estate - Court issued document appointing guardian(s) authorized to manage the individual's account(s)

Representative Payee Account:

- Letter from Social Security office appointing representative payee



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Winnebago
Community
Credit Union

Specialty Accounts

A business or organization can join the credit union if a majority of its directors, owners or members are eligible for membership, or the organization has a business location within any geographic limits of the credit union's field of membership. This does not need to be the organization's main office, just a business location.

Business Account:

Limited Liability Corporation (LLC)

- EIN Letter from IRS
 - If a single member LLC account, a Social Security number may be used
- Articles of Organization
- Operating Agreement (if a multiple member LLC)
- Authorized signers and titles

Sole Proprietorship (dba)

- Social Security number of owner

Corporation

- EIN Letter from IRS
- Articles of Incorporation
- Corporate Resolutions and/or By-Laws
- Authorized signers and titles

Not-for-Profit Corporation

- EIN Letter from IRS
- Articles of Incorporation/Organization
- Corporate Resolutions and/or By-Laws
- Meeting minutes documenting current officers and authorized signers with titles

General Partnership/Limited Liability Partnership (LLP)/Limited Partnership (LP)

- EIN Letter from IRS
- Articles of Organization
- Partnership Agreement/Limited Partnership (LLP/LP) or Limited Partnership Certificate (LP)

Organizations:

- EIN Letter from IRS
- Articles of Organization
- By-Laws if applicable
- Meeting minutes documenting current officers and authorized signers with titles

Other Organizations/Unincorporated Associations (e.g., a softball league, book club, parent-teacher association, benefit, memorial, or campaign). Additional documents may be required, please contact the Account Specialist.

- Individual's Social Security number opening the account or EIN Letter from IRS
- Letter from account holder or meeting minutes documenting authorized individuals onto account

For questions regarding Specialty Accounts please contact:

Jennifer Will
jwill@wincu.org
920.651.3083



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