



GUARDIANSHIP AND CONSERVATORSHIP ACCOUNT CHECKLIST

Membership with the Credit Union is open to all who live, work, worship, attend school, volunteer or participate in associations headquartered on the island of Hawaii.

Minimum Opening Balance: \$50.00

For accounts established for the benefit of a minor, the minimum opening balance is \$5.00, consistent with the Children's Regular Share account.

Please visit any Credit Union branch office to open the account.

Documentation Required. Please provide original, un-expired documents as applicable:

- ☐ Federal Tax ID Number for Custodian, Beneficiary and, if applicable, Attorney of account.
- ☐ Valid, un-expired, government-issued identification with photo for the Custodian and, if applicable, Attorney of the account
- ☐ Court issued copy of certified Letters as evidence of the appointment and authority of the Guardian/Conservator/Attorney
- ☐ Either the Beneficiary or the Custodian must be eligible for membership with the Credit Union