

## Documents Required to Open Account

### Sole Proprietorship

1. Business Filing: In most cases, our staff will find/verify your business filing using online database searches
2. Social Security Number (SSN), Federal Tax Identification Number (TIN), or Employer Identification Number (EIN)
3. Complete an iQ Business signature card at a branch near you
4. Appropriate identification for all signers
5. Signature of all authorized signers – must sign in person or have their signature notarized on the iQ Signature Card

### Limited Liability Company

1. Limited Liability Operating Agreement (sometimes called Company Agreement)
2. Proof of registration with the Secretary of State, or we can go online and obtain a copy for you
3. Business Filing: In most cases, our staff will find/verify your business filing using online database searches
4. Federal Tax Identification Number (TIN), Employer Identification Number (EIN), or Social Security Number (SSN) a. TIN or EIN if multiple-member LLC b. SSN for single-member LLC is acceptable
5. Complete an iQ Business signature card and an iQ Resolution of Authority at a branch near you
6. Appropriate identification for all signers
7. Signature of all authorized signers – must sign in person or have their signature notarized on the iQ Signature Card

### Partnership - General or Limited

1. Partnership Agreement
2. Proof of registration with the Secretary of State, or we can go online and obtain a copy for you
3. Business Filing: In most cases, our staff will find/verify your business filing using online database searches
4. Federal Tax Identification Number (TIN), or Employer Identification Number (EIN)
5. Complete an iQ Business signature card and an iQ Resolution of Authority at a branch near you
6. Appropriate identification for all signers
7. Signature of all authorized signers – must sign in person or have their signature notarized on the iQ Signature Card

### Corporation

1. Corporate Bylaws
2. Articles of Incorporation
3. Proof of registration with the Secretary of State, or we can go online and obtain a copy for you
4. Business Filing: In most cases, our staff will find/verify your business filing using online database searches
5. Federal Tax Identification Number (TIN), or Employer Identification Number (EIN)
6. Complete an iQ Business signature card and an iQ Resolution of Authority at a branch near you
7. Appropriate identification for all signers
8. Signature of all authorized signers – must sign in person or have their signature notarized on the iQ Signature Card

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### Association/Club

1. Meeting Minutes
  - a. Outlining in detail who the Authorized Signers for the iQ account will be and their duties
2. Federal Tax Identification Number (TIN), or Employer Identification Number (EIN)
3. Complete an iQ Association/Club signature card and an iQ Resolution of Authority at a branch near you
4. Appropriate identification for all signers
5. Signature of all authorized signers – must sign in person or have their signature notarized on the iQ Signature Card

### Glossary/Resources

1. Obtain a business license by going to:
  - a. In Washington: <http://bls.dor.wa.gov/file.aspx>
2. In Oregon: <http://www.oregon.gov/business/Pages/toolkit.aspx>
3. Register with the Department of Revenue:
  - a. In Washington: <http://dor.wa.gov/content/doingbusiness/registermybusiness/>
  - b. In Oregon: <http://www.oregon.gov/DOR/BUS/Pages/starting.aspx>
4. Protect your identity - Obtain a free TIN or EIN from the IRS:  
[http://www.irs.gov/Individuals/InternationalTaxpayers/Taxpayer-Identification-Numbers-\(TIN\)](http://www.irs.gov/Individuals/InternationalTaxpayers/Taxpayer-Identification-Numbers-(TIN))
5. Business Documents: Corporate Bylaws, Corporate Resolution, Articles of Incorporation, Partnership Agreement, or LLC Operating Agreement
  - a. We recommend using an attorney, an office supply store, or Google to assist you with these documents
6. Appropriate I.D. for signers on any iQ account includes valid drivers license, passport, social security card, etc.