

BANKING ACCOUNT CHECKLIST

Name: Class/Block: Date:

Choose a financial institution operating in your community. Research the services it offers to help you make your transition from secondary school, like student loans or student accounts. Use the web, printed brochures from the institution, or questions to staff to gather the information listed below. Prepare a class presentation, using graphics or other aids you need.

Name of financial institution: _____

Number of local branches: _____ Number of local ATMs: _____

Number of branches in other locations _____

Address of local branch: _____

Hours of local branch: _____

Are deposits insured by CDIC/CUDIC? _____

Special services for students and youth: Fees waived Parent signature needed
 Student loans available Other credit services for youth

Accounts available for students and youth:

Type of account: _____

Transaction limits: _____

Interest rate: _____ % Calculated: daily/monthly on minimum/average balance

Monthly fee: \$ _____ Fee waived if balance of \$ _____

Telephone/internet banking: Included Fee: \$ _____

Transaction history available online for previous _____ months

Transfers to other accounts Transfers to other institutions

Electronic funds deposit Pre-authorized bill payment

Debit/ATM card: Included Fee: \$ _____

Other network fees: \$ _____ International network fees: \$ _____

Chequing: Included Fee: \$ _____

Printing cheques: \$ _____ NSF charge: \$ _____

Other charges: Balance enquiries Bill payments _____

Other: _____