

## 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: \_\_\_\_\_