



## Envision Banking Online Set-up

### To start, each applicant must:

- Have a valid **BC Driver's License** (a copy of this will be required during the account opening)
- Be at least **19 years of age** with an established credit history
- Allow for **up to 10 minutes** per applicant to open your membership and account(s)

### Please remember:

- Open your account at least 10 days prior to mortgage funding
- Enter your name exactly as shown on your Driver's License
- Each applicant must have their own Driver's License and take their own picture when prompted
- When opening a joint account both applicants must apply during the same session (otherwise the membership opening will need to be completed in-branch prior to mortgage funding)
- When selecting your account, please choose the Simply Free Account
- **Your initial deposit of \$5 to fund membership shares is required before your account can be used or your mortgage funded**

**Next — Go to**

**<https://join.envisionfinancial.ca/>** and follow the prompts

### Next steps:

- **Notify your mortgage broker once this has been completed and provide them with the reference number**
- Within 2 business days, an Envision onboarding specialist will reach out to ensure you have the accounts and services you need
- The entire mortgage process will be completed remotely including all signatures
- The advisor that reaches out to you after the account is opened will be your main point of contact for all signing

