

Columbia Bank Complete Help Guide

This guide is designed to help both new signers opening an account for the first time and current signers transitioning from another bank to Columbia Bank.

1. Submit the Checking Account Request Form - The volunteer who will be the primary signer must complete the [Checking Account Request Form](#).

1. Select “**New Account**” and specify whether it is a **Troop, Camp, or Service Unit** account.
2. Enter your group’s information and choose your **preferred bank**.
3. Complete the **Columbia Bank CIP Form** (linked on page 3 of the application) for yourself.
4. Enter **your contact information** in the GSWW application.
5. Enter the **legal name and contact details of each co-signer**.
6. Review and acknowledge the **signer’s responsibilities**, then **sign and submit** the application.

Once submitted, **all cosigners** will automatically receive an email with the same information. Each cosigner must:

- Read the full email.
- Click “**Approve**” at the very bottom of the email to sign the GSWW application.
- Complete the Columbia bank CIP Form link at the top of the email.

2. Application Processing - Once all steps above are completed, the Volunteer Banking Coordinator will review and process the application. Processing time may vary depending on application volume or staff absences and have been known to take 3-14 business days.

3. Next Steps or Pending –

- If **approved**, Volunteer Banking will send a Next Steps email.
- If **pending**, Volunteer Banking will send a list of items that require completion before proceeding with the application request.

4. DocuSign – Once GSWW approves your application, Columbia Bank will send DocuSign signature requests to all signers. Expected timing: **1–14 business days** from the date the Next Steps email is sent, depending on application volume or staff absences.

5. Welcome Email & Initial Deposit - After all DocuSign signatures are complete:

- Columbia Bank will send a **Welcome Email** to all signers.
- An **initial deposit of \$25** must be made within **10 business days** of receiving the Welcome Email.
 - **Accounts not funded within 10 business days will be closed.**
 - If GSWW is holding cookie/fall product funds, they may not reach your new account in time. We

recommend that **one signer makes the initial deposit** directly.

6. Fund Transfer & Account Closure (if applicable) - Once you receive your new Columbia Bank debit card, stop using your old Volunteer-Led bank account. To transfer funds between accounts:

- **Option 1:** Email VolunteerBanking@girlscoutswv.org to request a transfer.
- **Option 2:** Write a check from the old account and deposit it into the new one.

IMPORTANT NOTES:

- The old volunteer-led bank account **must be closed by a signer**. This can be done by contacting your local branch directly.
- When completing your Annual Troop Finance Report (ATFR), only **one report per troop** is required. Be sure to include information for **both** the old and new bank accounts in the section labeled "Add Bank".
- To ensure smooth and seamless electronic transfers during the Fall Product Season and the Girl Scout Cookie Season, temporary restrictions on bank account changes will be in effect from October 1 through April 1 each year. **Any bank switch requests, including to Columbia Bank (formerly Umpqua), will not be processed during these dates.**

Online Banking Navigation Resources:

Quick Reference PDF below

https://www.umpquabank.com/globalassets/media/documents/help-center/business-online-banking-guide_navigation.pdf

Quick Reference video below

<https://youtu.be/-m1TA3ZFuMk?si=VaO2M1CIEBUgEDWB>

If you have questions or need assistance, please reach out at volunteerbanking@girlscoutswv.org.

