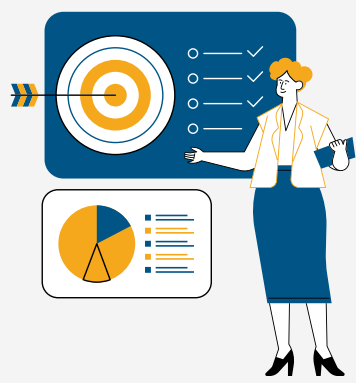# SFRG ACCOUNT

FIRSTLIGHT
FEDERAL CREDIT UNION

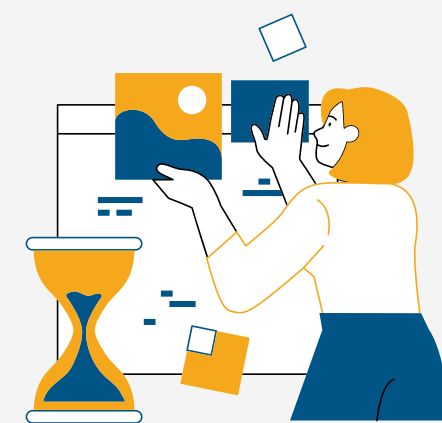## OVERVIEW GUIDE

01.

WHAT IS AN SFRG ACCOUNT:

An SFRG bank account is an account associated with a Service Member and Family Readiness Group (SFRG), which is a command-sponsored program within the military designed to support service members and their families. These accounts are used to manage funds for activities, events, and programs that benefit SFRG members and their families. The SFRG bank account enables the group to collect donations, fundraise, and disburse money for various initiatives, such as social gatherings, educational programs, and community outreach efforts.

02.

GETTING PREPARED:

- EIN Letter: Issued by the IRS, used for tax reporting.
- Memorandum: Signed by Commander, and issued within the last 30 days, this document confirms the approval to open the account and identifies the Authorized Signers.
- Valid Identification for the Authorized Signers.
- Account requires at least two Authorized Signers.

03.

LET'S GET STARTED:

Once you have collected the necessary documents mentioned above, let's begin the process of opening the SFRG account.

Please visit one of our Engagement Centers, contact us by phone or use live video banking to schedule a virtual consultation with an Account Specialist and to submit any account opening documents you have collected, as this will help expedite the process.

04.

WE'LL TAKE IT FROM HERE:

With improvements to our account opening process, we now provide a simplified and streamlined virtual experience for you.

Within a few business days, one of our Account Specialists will contact you to review your request, obtain any additional documents or information if necessary, and address any questions you may have about the account and/or the account opening process.

05.

YOUR ALL SET:

Once everything is finalized, we will provide you with the account number and send the necessary documents and disclosures electronically for you to sign (If in-person signing is required, we can arrange this upon request).

The account is now active and ready for use.