

Concentration Banking FAQs

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Opening a new IEEE Concentration Banking account

Two signatures are required for the set up a new account. Completed, original signature forms must be returned as the bank will not accept faxed or scanned signature cards. Supplies (checks, deposit slips and endorsement stamp) will be ordered once the account is opened. There is no cost for this service.

Please send requests as indicated below. All forms and information will be forwarded to you via e-mail.

Geographic Units; send a request via e-mail to: concentration-banking@ieee.org.

Conferences: Conference organizers should send their requests via e-mail to: conference-finance@ieee.org.

Custody Accounts (Regions 8-10):

Simply send an email to: custody-account@ieee.org stating your request to open a Concentration Banking account.

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Making a deposit

****USD \$ account***

Deposits of checks and cash can be made in person at any local Wells Fargo location. If there is not a branch near you, we provide postage paid Bank by Mail envelopes. *Please do not mail cash!!* We suggest purchasing a money order for cash deposits that will be mailed. **In either case you must use the preprinted deposit ticket provided for all deposits. DO NOT** use the account number printed at the bottom of your checks. The account number on your deposit ticket differs from the account number on the bottom of your checks. Using the correct supplies and account number is important to insure your account is properly credited.

****CAD \$ account***

Check and cash deposits can be made in person at any local Bank of Montreal location utilizing your preprinted deposit tickets

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Ordering additional banking supplies

All supply requests must be ordered through IEEE. If you need additional supplies, such as : checks, deposit tickets, deposit stamp or postage paid Bank by Mail envelopes contact us at: concentration-banking@ieee.org.

Be sure to include your Account name, 6-digit location number and starting check number if applicable.

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Adding or changing Authorized account signers

Please send a request for a signature card to: concentration-banking@ieee.org, Completed original forms must be mailed to the attention of the person and address listed at the bottom of the form as the bank will not accept any type of electronic copy.

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Accessing online statements

The user name and password to view your Concentration Banking account statement on the CBRS website is your IEEE account user name and password. This is the same information used to view your membership and subscription information.

The website for CBRS is <https://webapps1.ieee.org/CBRS/CBRS>

For Custody Accounts (Regions 8-10): P

Please send your inquiry for account access to: custody-account@ieee.org

Conferences:

Please send your inquiry for account access and signature updates to: conference-finance@ieee.org

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Transfer of funds

Funds can be sent via wire transfer. In order to protect your account against fraudulent activity, this information should **not** be made available on line. It should be forwarded to individuals on a need to know basis.

Incoming wire transfers are free. There are no fees charged by Wells Fargo or the *IEEE Concentration Banking Program*. Any fees deducted from the wire transfer would have been charged by either the originating or an intermediary banks. Incoming wire transfer instructions are available by contacting us at: concentration-banking@ieee.org.

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Sections or Chapters:

To request an outgoing wire transfer for Sections or Chapters, send your e-mail request to finance-solutions@ieee.org.

Conferences:

To request an outgoing wire transfer for Conferences, send your e-mail request to conference-finance@ieee.org.

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CB to CB account transfer (book transfer)

This type of request must be initiated from the treasurer or authorized signer of the sending account.

Send your e-mail request with the following information to concentration-banking@ieee.org.

Please transfer \$ 0.00 **from** Hop# XXXXXX **to** Hop# XXXXXX

Other questions?

Please contact us at: +1 732 562 5363 or concentration-banking@ieee.org.

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