

# Organizational Documents and Authorized Representatives

This table lists the basic documentation that may be required for each type of entity.

Type of Entity	Authorized Representative	Formation Document Giving Legal Status	Document Granting Authority
<b>Corporation (profit)</b>	Corporate Officer: <ul style="list-style-type: none"> <li>• President</li> <li>• Vice President</li> <li>• Secretary</li> <li>• Treasurer</li> </ul>	<ul style="list-style-type: none"> <li>• Articles of Incorporation filed in State or Origin</li> <li>• Certificate of Good Standing</li> </ul>	<ul style="list-style-type: none"> <li>• Corporate Resolution</li> <li>• Bylaws</li> </ul>
<b>Corporation (non-profit)</b>	Variable - see Bylaws: <ul style="list-style-type: none"> <li>• Officer</li> <li>• Directors</li> <li>• Board/Committee</li> <li>• Membership</li> </ul>	<ul style="list-style-type: none"> <li>• Articles of Incorporation</li> <li>• Certificate of Good Standing</li> </ul>	<ul style="list-style-type: none"> <li>• Articles of Incorporation</li> <li>• Bylaws</li> <li>• Resolutions</li> <li>• Minutes of Meetings</li> <li>• Membership Votes</li> <li>• Higher/Parent entity authorization</li> </ul>
<b>General Partnership</b>	Any Partners (if proper authorization)	Partnership Agreement <ul style="list-style-type: none"> <li>• Any Amendments</li> <li>• Any Assignment of Partnership Interests</li> </ul>	Partnership Agreement & Amendments
<b>Limited Partnership</b>	General Partner	Certificate of Limited Partnership filed in the State of Origin	Partnership Agreement & Amendments (Limited Partners may have to consent to certain major transactions)
<b>LLC</b>	Variable - see Operating Agreement: <ul style="list-style-type: none"> <li>• Members</li> <li>• Manager</li> <li>• Officer</li> </ul>	Certificate of Formation filed in the State of Origin	<ul style="list-style-type: none"> <li>• Operating Agreement</li> <li>• Filed Articles of Formation, if no Operating Agreement</li> <li>• Resolution/consent</li> <li>• Non-managers may have to consent to certain transactions</li> </ul>
<b>Trust (traditional)</b>	Trustee	Trust Agreement	Trust Agreement & Amendments (Powers limited to Trust Purposes)
<b>Land Trust or Common Law Trust</b>	Trustee	Trust Agreement, all assignments of transferable beneficiary	Trustee acts only on direction of other parties, usually the holders of transferable beneficiary interests.

		interests, and all related documents	SEE YOUR UNDERWRITER
<b>Individual Retirement Account (IRA)</b>	Custodian or Trustee	Individual Retirement Account Agreement	Custodian acts on direction of the individual depositor of the IRA
<b>Profit Sharing Plan or Pension/Retirement Plan</b>	Trustee	Trust Agreement (often goes by another name, i.e. “_ Profit Sharing Plan”)	Trustee usually acts on direction of the individual plan participant(s)
<b>Unincorporated Association</b>	Variable - see Organization Agreement: <ul style="list-style-type: none"> <li>• Board</li> <li>• Officers</li> <li>• Members</li> </ul>	By-Laws and/or Articles of Association	Usually Resolution of the Association and membership vote