

# Building and maintaining a relationship with your banker

## Checklist

Your banker is a valuable member of your network. In order to build and maintain that connection, consider what you'd like from your banking relationship and what's important to you as a business owner.

### Have you:

- Set the stage for open, honest communication and collaboration with your banker? Have you shared your story, background, experience, your team, and your business opportunities?
- Set expectations early on how often you prefer to connect?
- Prepared for proactive conversations with your Relationship Manager about challenges, financing needs etc.?
- Ensured your key financial documents are in order, including financial statements, cash flow projections and business assumptions?
- Ensured your personal financial documents are in order (i.e., confirmation of income, Notice of Assessment)?
- Defined what a 'no surprises' banking relationship should be for you and your banker?
- Prepared to treat your banker as a partner; soliciting their advice and feedback, for introductions, and potential opportunities?

## Let's connect

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-  Visit us at [bmoforwomen.com](http://bmoforwomen.com)