



Signature Guarantee (Medallion) Customer Information

This following is to assist customers with the preparation of documents requiring a Signature Guarantee, aka Medallion Stamp. The Signature Guarantee Stamp will only be used on transactions that involve the sale, transfer, redemption, or liquidation of securities and can only be completed by authorized users at specific Banking Center locations.

**** Requests are by appointment only ****

To insure that an authorized Stamp holder will be available to assist with your request, please call **1-800-322-8233** to schedule an appointment

Signature Guarantee requests are offered at the following Banking Centers:
Palmer, Wilbraham, Charlton, and West Brookfield

Country Bank's Stamp covers up to **\$500,000** in value, therefore, we are unable to guarantee any transfers for a security valued higher than this limit

Signature Guarantee (Medallion Stamp) Requirements:

- The Signature Guarantee service is only extended to Country Bank customers in good standing for 6 months and there is a charge for this service per appointment – Please refer to our Schedule of Fees and Charges for the current rate
 - If multiple signers are needed on a document, only one needs to be a customer
- The Authorized Stamp holder must verify the signature is genuine, so please **do not sign the document(s) prior to your arrival**
- Two forms of identification must be provided
 - One Primary and one Secondary are required for all signers
- If the request involves a transfer of items listed in another individual's name, you must provide other proper supporting Legal Documentation (See Page 2) authorizing your ability to sign in a capacity other than your own
 - Some documents may need legal advisement depending on their complexity which could possibly require a deferment of appointment until further guidance is provided
- A **most recent statement** for the securities is required to verify the number of shares or numerical balance amounts, as well as, the account numbers related to the trade or instruction letter
- If transfer involves stock please provide:
 - The Physical Stock Certificate or an official document showing amount of Computershare held
 - Current stock prices as of the day we are stamping your documents – This information can generally be obtained from numerous websites due to the frequency in change of stock value

Primary Forms of Identification:

- Valid Driver's License
- Valid MA ID
- Valid Passport
- Firearms License/Permit
- Police, Civil Service, or Military ID
- Permanent Resident Card

Secondary Forms of Identification:

- Social Security Card
- Current Credit Card (with signature)
- Insurance Card (with name and Social Security number)
- Birth Certificate
- Marriage Certificate
- Student ID (with signature)
- MA EBT Card
- MA Learner's Permit
- Current utility bill (showing current address)
- Paystub dated within 30 days (showing current address)
- Employee ID (with picture and signature)

Other necessary legal supporting documents may include:

- Death Certificates
- Personal Representative/Executor Documents
- Conservator or Trustee Authorization
- Letters of Testamentary
- Trust Documents
- Affidavit of Domicile