



Signature Guarantee Customer Information

Country Bank is providing this information to assist customers with the preparation of documents requiring a Medallion Signature Guarantee. Signature Guarantee stamps are often referred to as Medallion Guarantees or Medallion Stamps. 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 Medallion users at various branch locations.

To insure that an authorized Medallion user will be available to assist you with your request, please call to schedule an appointment before your visit to one of our four designated branch locations: **Charlton Office, Main Street (Ware) Office, Palmer Office and the Wilbraham Office at 1-800-322-8233.**

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 \$10.00 charge.
- The Medallion user must verify the signature is genuine, so please **do not sign the document(s) prior to your arrival.**
- Please provide two forms of identification- one primary and one secondary*.
 - If you are signing in a capacity other than your own (Personal Representative, Conservator, Trustee, etc.) we will need the supporting legal document(s) to verify your authorization. Please make arrangements to provide us these documents ahead of time as we may need to seek legal advisement depending on their complexity.
- Please provide the most **recent statement** for the securities to verify balance amounts and account numbers related to the trade or instruction letter. Country Bank's Medallion Stamp covers up to \$500,000 in value, therefore we are unable to guarantee any transfers for a security valued higher than our limit.
- If transfer involves stock please provide:
 - Physical stock certificate
 - Current stock prices as of the day we are stamping your documents. This information can be obtained from numerous websites or your broker can provide us with a hard copy stating the value. Suggested sites are NASDAQ.com, aol.com, Bloomberg.com, NYSE.com, and MoneyCentral.msn.com. You may also use daily publications' (i.e. Wall Street Journal or USA Today) stock page showing pertinent stock price.

If you have any questions, please contact Country Bank at (800) 322-8233 for more information or to schedule an appointment with an authorized Medallion Signature Guarantee agent.

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
- Letters of Testamentary
- Trust Documents
- Affidavit of Domicile