

A signature guarantee (medallion guarantee) is used in situations involving the sale or transfer of securities. It warrants the signature was genuine, the signer was an appropriate person to endorse the security or originated the instruction and the signer had legal capacity to sign.

## DOCUMENTS YOU WILL NEED

- Acceptable Identification**
- Document showing value of what is being guaranteed**
- Power of Attorney paperwork (if applicable)**
- Death certificate (if applicable)**

## ITEMS RELIANT CAN SIGNATURE GUARANTEE

- Transactions involving a sale, transfer or redemption of a security
- Name change on a security
- Change of ownership or a reduction of assets/holdings of a security
- EE bonds

## ITEMS RELIANT CANNOT SIGNATURE GUARANTEE

- Any transaction over \$500,000
- Administrative changes, such as address changes, auto loans, beneficiary changes POA changes and various types of commercial applications
- Commercial certification typically covered by a notary public
- Requests involving unknown, unlimited future transactions that cannot be valued

## IMPORTANT INFORMATION

- Reliant is authorized to signature guarantee for members only.
- Transaction must be signed in front of the guarantor.
- The member must provide proof of the value of the stock/security being guaranteed.
- The request is required on an Application or Enrollment form.

## TO SCHEDULE AN APPOINTMENT:

Our Member Service Center can be reached via phone or online chat:  
Monday-Friday: 8:30AM-5:00PM  
Saturday: 9:00AM-12:00PM