

Medallion Signature Guarantee Requirements

- **Each person requiring their signature to be guaranteed must:**
 - Be a member with Bellco Credit Union for 6 months or more
 - Have their account in good standing
- **2 forms of ID**
 - A Bellco Credit Union account can count as one form of ID
 - A valid, non-expired government-issued ID (black stripe IDs are not an acceptable form of identification for signature guarantees)
- **Proof of securities ownership (all owners must be present)**
 - Statement
 - Actual stock certificate
- **Proof of Value**
 - Bellco Credit Union is limited to guarantee signatures for \$500,000.00 or less per transaction
- **Verification of legal right to sign**
 - Death certificate (court document showing appointment and authority)
 - Trust agreements
 - Corporate resolution
 - Power of Attorney
 - Additional documentation may be required

The Medallion Stamp **CAN** be used to guarantee an endorsement on transaction involving a change of ownership or a liquidation of the following items:

- Stocks
- Bonds
- Mutual funds
- Savings bonds
- Unit investment trusts
- Other investment vehicles that meet the definition of a security

The Medallion Stamp **CANNOT** be used on transactions that do not involve the sale, transfer, redemption, or liquidation of securities, such as:

- Savings account withdrawals
- Bank account closeouts
- Check endorsements
- Auto loan applications
- Certificates of deposit
- Amendments to partnership or trust agreements
- Changes to life insurance or pension trust beneficiaries
- Electronic funds transfer enrollment forms
- Treasury direct administrative account updates
- IRAs that do not contain securities
- Copies of documents involved in a security transaction
- Guaranteeing or certifying maintenance or administrative changes, such as address, TIN updates, account number changes, and the like