
MEDALLION SIGNATURE GUARANTEE PROGRAM CHECKLIST

The Medallion Signature Guarantee program is available to good-standing members at all Amplify Credit Union branches. The Medallion Signature Guarantee program provides a Medallion imprint to guarantee the signature(s) of a certified owner(s) for the sale, assignment, transfer, or redemption of a security. Transactions which often require a Medallion Signature Guarantee include transactions for stocks, bonds, mutual funds, and some annuities.

The Medallion Signature Guarantee program is not for use on non-security events. These include, but are not limited to, account maintenance changes, beneficiary changes, or authorization for wire transfers.

Check to confirm there is a blank box in proximity to the area designated for the Medallion Signature Guarantee. When a separate box is not provided, proof of authenticity may be affected, and your document(s) could be rejected by the institution that requires the Medallion imprint.

To obtain a Medallion Signature Guarantee at Amplify, please provide the following:

- ☐ **Your Amplify Credit Union member number.**
- ☐ **Current, non-expired government-issued photo identification.**
If there is more than one account owner, all security account owners must be present at the same time and provide current, non-expired government-issued photo identification.
- ☐ **Your completed documents (except for your signature and the date).**
Documents with corrections and/or incomplete documents cannot be signature-guaranteed.
- ☐ **Your most recent external account statement showing ownership, account number, and value of the security.**
The external account statement must be less than 90 days old and is provided by the institution where the security is held.
- ☐ **Proof that you are the appropriate person to sign in a capacity other than the owner, if you are not the owner.**
(e.g., Power of Attorney, Trust Agreement, Death Certificate, probate documentation, Corporate Resolution, etc.).
- ☐ **Physical stock certificate(s), if applicable.**
If the transaction relates to stock, Amplify Credit Union must verify the current value of the stock through a reliable source.
- ☐ **Letter of intent and written instructions from a brokerage firm, if applicable.**
The instructions need to state what must be contained in the letter, who must sign the letter, and that the signatures must be guaranteed.

To provide a quicker turnaround time for the request, members are encouraged to submit their documentation ahead of time for preliminary review.

DISCLAIMER: Amplify Credit Union may ask for additional documentation, other than the items listed above. Amplify Credit Union reserves the right to consult with legal counsel, if necessary. Amplify Credit Union may decline to provide a Medallion Signature Guarantee if documentation provided is insufficient to determine the appropriate person to sign. Under the Medallion Signature Guarantee program, Amplify Credit Union may retain copies of documentation and forms provided and signed.