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## MEDALLION SIGNATURE GUARANTEE

In the United States, a Medallion Signature Guarantee is a special signature guarantee for the transfer of securities. It is a guarantee by the transferring financial institution that the signature is genuine and the financial institution accepts liability for any forgery. Signature guarantees protect shareholders by preventing unauthorised transfers and possible investor losses. They also limit the liability of the transfer agent who accepts the certificates.

Medallion guarantees are processed at our Croydon office. Please note that these are not done on site. We apply our stamp, then your documents are sent to our agents to be medallioned.

**Requirements** for obtaining the medallion guarantee are as follows:

- The **original** form for Medallion Guarantee stamping completed in full and signed by the Owner(s)/Executor(s). Please **do not date** the form that requires a medallion, as the medallion stamp is only valid for 60 days;
- A solicitor certified black and white copy of the Owner's/Executors' passport(s) or driving licence;
- An original or solicitor certified copy of a recent utility bill, bank statement or Council Tax bill (one for each Owner/Executor) which is no older than 3 months;

- Evidence of the shareholding/account (statement or copy of share certificate) an ordinary photocopy will suffice;
- A copy of the Grant of Probate (a photocopy will suffice) if the matter relates to a deceased's estate;
- A covering letter confirming your instructions together with your full contact details (incl telephone number and email address if you have one);
- Payment is in advance. Please forward a cheque made payable to 'IWC Ltd' for the appropriate amount (see charges below.)

### **Charges:**

The total cost for the Barcoded Medallion Signature Guarantee stamp for one holding is £295 plus VAT.

The cost of the stamp for each subsequent holding required is £199.75 (incl VAT).

Please note that if there are several classes within the same holding, these are treated as separate medallions.

Please also note that if we are required to complete any forms, an additional charge of £25 plus VAT is made per form.

### **Please send to:-**

IWC Estate Planning & Management Ltd  
Suite 43-45 Airport House  
Purley Way  
Croydon  
CR0 0XZ

Once we have received your instructions, completion takes approximately 20 working days.

Please note that we are not liable for any delays occasioned by third parties.

