



Signature Guarantee Instructions

Requirements for Signature Guarantee Stamp

- Completed "Authorization to Transfer" Form(s)
- Notarized Client Signature on "Authorization to Transfer" Form(s) (if available)
- Copy of Client's State Issued Picture ID
- Completed Signature Guarantee Request Form
- Copy of Brokerage Statement (holdings/assets page)
- Appropriate Fees

Fees:

- Medallion/Signature Guarantee: \$25.00 check or money order made payable to:

Puritan Brokerage Services

- Standard Return Postage & Handling Fee: \$5.00*
- Overnight Postage & Handling Fee: \$20.00*

**Postage fee not required if self-addressed prepaid return envelope accompanies request*

Send To:

Puritan Brokerage Services, Inc.
16801 Addison Road, Suite 430
Addison, TX 75001
(Not available for weekend delivery)

****IMPORTANT****

INCOMPLETE FORMS WILL BE RETURNED TO AGENT

16801 Addison Road, Suite 430, Addison, TX 75001 | *Ph.* 972-331-5678 | *Fx.* 972-331-5679 | *Web:*
www.puritanbrokerage.com

Member FINRA/SIPC

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SIGNATURE GUARANTEE REQUEST

Date: _____

_____ and _____
(Print client name) (Print client name if joint)

Regarding the transaction for: _____
(Company Name)

(Company Address)

(City, State, Zip)

I hereby request:

1. The signature(s) is/are known to me or was/were affixed to the attached document in my presence.
2. The client(s) has/have reached age of majority in jurisdiction in which the transaction will occur.
3. The client(s) is/are legally competent to execute this transaction for the date of this request.
4. I have included a copy of a driver's license, passport, or other government issued picture ID with the paperwork.

I agree to hold harmless Puritan Brokerage Services, Inc. and any person authorized by Puritan Brokerage Services, Inc. to guarantee signatures ("Authorized Individual") from any loss, liability, claim or demand (including costs of investigation, attorney's fees and court costs) which they may suffer or which may be asserted against them by reason of an Authorized individual guaranteeing a signature at my request.

Agent Signature

Print Agent's Name