



## MEDALLION SIGNATURE GUARANTEE CUSTODIAN REQUIREMENTS

FIRM	REQUIREMENTS
Advanta IRA	Wet signatures.
American Funds	Wet signatures. If over \$125k and/or if WIRE- originals and MSG required. If under \$125k and CHECK- can fax with no MSG. If MSG is required it must be originals.
Ameriprise	If over \$110,000 MSG required. Wet signatures.
Charles Schwab	E-signatures accepted. If transfer amount is over 1 mil and e-signed MSG required.
Edward Jones	E-signatures accepted.
Equity Trust	E-signatures accepted.
E*Trade	Wet signatures.
Fidelity	Wet signatures.
Forge Trust	E-signatures accepted.
iPlan Group	E-signatures accepted.
JP Morgan Chase	Wet signatures. MSG or notary required.
Kingdom Trust	E-signatures accepted with audit trail.
LPL Financial	Wet signatures. MSG required.
Merrill Edge/Lynch	E-signatures accepted. If over \$100k MSG required. Checks only.
Millennium Trust Co.	E-signatures accepted with audit trail. Client must call to confirm if e-signed. If over \$200k must mail original with MSG.
Morgan Stanley	E-signatures accepted.
Pacific Premier Trust	Wet signatures. MSG required.
Pershing	E-signatures accepted.
Primerica	Wet signatures.
Provident Trust Company	Wet signatures. MSG required.
Strata Trust Company	E-signatures accepted with audit trail page.
TD Ameritrade	E-signatures accepted.
Vanguard	E-signatures accepted.
Wells Fargo	Wet signatures.

**\*If you do not see your custodian listed please contact IRA Club for further instructions**