

To update your name, date of birth or Social Security number, please complete the appropriate parts of this form with the required information below. Please return this form with any supporting documents to us using one of these convenient methods:

For faster service, this form can be completed electronically by signing into your account on merrilledge.com.

or

Please complete this form and fax to 866.994.7807 or mail to:

Merrill Document Processing

PO Box 14354

Lexington, KY 40512-9706

You may also call Merrill at 877.653.4732 with any questions. Representatives are available to assist you 24 hours a day, 7 days a week.



Action required

Information Change/Update Form

Account number(s): _____
(at least one full account number must be listed)

I, _____ authorize the below changes to be made to my profile.
(print name as it currently appears on the account)

Apply updates to all accounts listed in my name

Apply changes only to the account(s) listed above

Note: If no selection is made, the updates will be applied to the above listed account number(s).

Part A – Name changes

I have recently changed my name or need to update my name and would like my account to reflect this change. Please change my

name on the above-referenced account(s) to: _____, _____,
(first name) (middle name)

(last name)

This change is due to (choose one):

Marriage

Divorce

Court order

Name misspelling

Other: _____

In support of this request, I have submitted copies of the following documentation (at least one is required):

Marriage certificate

Divorce decree

Court order

Social Security card showing updated/correct spelling of name

Birth certificate

Driver's license (may only be used for minor misspellings; adding/removing suffix does not count as misspelling)

