

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 1.877.229.7160 or mail to:

Merrill Document Processing

PO Box 31024

Tampa, FL 33631-3024

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

(An IRS W-9 form must accompany this information change form in order for your name change to be processed. The W-9 form may be found on www.irs.gov; search for "W9".)

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)

Part B – Date of birth update

Incorrect date of birth: _____

Correct date of birth: _____

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

- Driver’s license
- Birth certificate
- Passport

Part C – Social Security number updates

(An IRS W-9 form must accompany this information change form in order for your social security number update to be processed. The W-9 form may be found on www.irs.gov; search for “W9”.)

Incorrect Social Security number: _____

Correct Social Security number: _____

In support of this request, I have submitted copies of the following documentation:

- Social Security card

Part D – Marital Status update

Please choose applicable options and include spouse/domestic partner’s name (if applicable)

- Single
- Married _____ (first & last name)
- Domestic Partner _____ (first & last name)
- Divorced
- Separated
- Widow

Part E – For Cash Management Accounts only

Please order replacement

- Checks and/or
- Visa debit card

Part F – Signature(s) — Required for all changes

Signature (sign with new name for name change)

Date

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