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)	
Account number(s): (at least one full account number must be listed)	
I, authorize the below changes to be (print name as it currently appears on the account)	e made to my profile.
(print name as it currently appears on the account)	3 1
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. P	lease change my
name on the above-referenced account(s) to:	
(first name) (middle nam	e)
(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	<u>s</u>)

Part B – Date of birth update	
Incorrect date of birth:	_
Correct date of birth:	_
n support of this request, I have submitted copies of the fo	ollowing documentation (at least one is required):
Driver's license	
Birth certificate	
Passport	
Part C – Social Security number updates	
Incorrect Social Security number:	
Correct Social Security number:	
n support of this request, I have submitted copies of the fo	ollowing documentation:
Social Security card	
Part D – For Cash Management Accounts only	
Please order replacement	
Checks and/or	
Visa debit card	
Part E – Signature(s) — Required for all changes	
Signature (sign with new name for name change)	Date

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