

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
PO Box 29022
Hot Springs, AR 71903

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): _____

I, _____ (print name) _____ authorize the below changes to be made to my profile.

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: _____

This change is due to (choose one):

- Marriage
- Divorce
- Court order
- Name misspelling

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 or driver's license (may only be used for name misspelling)

Note: For marriage, divorce or court order name changes you must sign in both signature boxes in part E (current name and former name).

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

Part C – Social Security Number Updates

- 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 – 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 _____

For name changes due to marriage, divorce or court order only


Formerly known as (sign with old name)

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