Action Required

Letter of Authorization
Request to add account holder to Merrill Advisory Center account

I, ____________________________, would like to add ____________________________ to my Merrill account ____________________________ (account number). You may contact them at ____________________________ (phone number).

This is intended to be a (please check one of the following):

☐ Joint Account with Right of Survivorship

☐ Tenants in Common

☐ As Tenants by Entirety Account (ATBE), where state law approved of this form of ownership

☐ Other: ____________________________

__________________________________________  ____________________________
Signature                                                                 Date

For Merrill Advisory Center accounts, please submit this letter of authorization along with the Client Relationship Agreement(s) that must be signed by all new and existing account holders. For accounts with more than two account holders, a separate Client Relationship Agreement must be completed. Please fax documents to 866.994.7807 or mail to Merrill, P.O. Box 29002, Hot Springs, AR 71903-9002.

Please note: In order to complete the process of adding a new owner(s) to your existing Merrill Advisory Center account, please advise the new owner(s) to contact New Account Support Team at 888.657.8278, option 1, between 8 a.m. and 8 p.m. Eastern, Monday through Friday. Any additional account owners will be required to provide their personal and financial information, which will be used to verify their identities; it may take up to 20 minutes to complete this process.

Note: Please return all required documents to Merrill within 30 days of receipt to ensure timely processing of your request.