For Merrill Advisory Center accounts, please submit this Letter of Authorization along with the Client Relationship Agreement(s), which 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 Document Processing
P.O. Box 14354,
Lexington, KY 40512-9706

Merrill

Action required

Letter of Authorization — Request to add account holder to Merrill account

I/We, ______________________ (please print name) and ______________________ (please print name), would like to add

______________________ (please print name) to my/our 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

______________________ Signature ______________ Date

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 the National Financial Solutions Advisor Team at **888.637.3343**, option 1, between 8 a.m. and 10 p.m. Eastern, Monday through Friday. The 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.
For Merrill Edge® Self-Directed accounts, in lieu of this Letter of Authorization and the Client Relationship Agreement, you can visit **merrilledge.com** to establish a NEW retail joint account. Once the new account is established, please contact our Distributions team at **888.654.6837** to have funds transferred. Associates are available 8 a.m. to 7 p.m. Eastern, Monday through Friday.
If you have any questions, please contact the Merrill Client Service Team at **877.653.4732**, between 8 a.m. and 8 p.m. Eastern, Monday through Friday, and say **"Personal Information Update."**
Note: Please return all required documents to Merrill within 30 days of receipt to ensure timely processing of your request.

BANK OF AMERICA