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



## Action required

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

I/We,	and			would like to add
(please print name)	and	(please print name)		Would like to add
	to my/our Merrill acc	ount		
(please print name)			(account number)	
You may contact them at	(phone number)			
This is intended to be a (please check	k one of the following):			
Joint Account with Right of Survivor	rship			
Tenants in Common				
As Tenants by Entirety Account (AT	BE), where state law approved of t	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.

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Are Not FDIC Insured	lay Lose Value
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