

Please complete and **return all documents** to:
Merrill, P.O. Box 29002
Hot Springs, AR 71903-9002
Or fax to: 866.994.7807

Appoint custodian to relinquish assets form

Please note: This form is intended for use **only** when the current custodian is deceased or incapacitated, a successor custodian is recorded on file **and** the minor is now of vesting age.

To review alternative scenarios and/or additional requirements, or establish a new account in the name of the vested minor, I understand that additional documentation and information from the vested minor is required as outlined in the *Guide to completing required documentation*.

Account number: _____
(Existing UTMA/UGMA account number)

I, _____, hereby appoint _____ as custodian over my UTMA/UGMA account.
(Minor's name) (Custodian's name)

I, _____ accept custodianship over the UTMA/UGMA account, as I have been chosen to be the new
(Custodian's name)
custodian and hereby instruct Merrill to relinquish the assets in the account to the minor,

_____, as he/she has now reached the vesting age.

Transfer all assets to the vested minor's new account: _____
(Minor's account number)

Liquidate all assets and close the account by sending a check for the proceeds to the former minor at his/her address listed below:

(Street address) (City, state, ZIP)

Custodian's signature Date

Minor's signature Date

Witness's signature Date

NOTE: Additional transfer documents, verification and contact may be required.

If you have any questions please contact Life Services at **855.450.9015** between 8 a.m. and 6 p.m. Eastern, Monday through Friday. Be sure to have your account number available when you call.

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