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Relinquishment of control over assets to minor form

This form is to be used when the named minor has **not** yet reached the vesting (termination) age.

I, _____, custodian of UTMA/UGMA account _____, hereby
(Custodian's name) (Account number)

instruct Merrill to relinquish the assets in this account to _____
(Minor's name)

in the following manner:

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

NOTE: Additional paperwork/signatures may be required if the gaining account is not under the sole ownership of the minor.

OR

Close the account by sending a check for the balance of the account to the address listed below:

Street: _____

City: _____ State: _____ ZIP Code: _____

NOTE: Check will be sent in the name of the minor; all assets must be liquidated prior to the processing of a check request.

If you wish to liquidate or have any questions, please contact us at 877.653.4732, 24 hours a day, 7 days a week. One of our associates will provide further assistance. Be sure to have your account number available when you call.

Custodian's signature

Date

Custodian's primary contact number

NOTE: Additional verification and contact may be required.

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