

Authorization to Transfer Funds From a Bank Retirement Account



Bank of America IRA to Merrill Edge IRA transfers only

ATTENTION:

Please sign and return this form via fax:

Fax to: 866.994.7807

Or mail to:

Overnight and Regular Mail:

Merrill Edge
3315 Central Avenue
Hot Springs, AR 71913
Mailstop 29076

1. TRANSFER FUNDS TO:

Merrill Edge Retirement account number:

Client's last name, first name, middle initial:

Merrill Edge Account Type (please select one):

- Traditional/Rollover/SEP Roth IRA Inherited – IRA
 Inherited – Roth IRA

2. TRANSFER FUNDS FROM:

Resigning Bank of America account number:

(NOTE: Only one Bank of America Retirement account per transfer request)

Social Security Number:

Resigning Account Type (please select one):

- Traditional/Rollover/SEP Roth IRA Inherited – IRA
 Inherited – Roth IRA

3. Liquidation Options (please select one):

- Liquidate at maturity—maturity date: _____
 Liquidate now. I am aware of and acknowledge any bank penalty that may be incurred. (Please select this option for CDs that need immediate liquidation, or Money Market IRAs.)

4. Full or Partial Liquidation (please select one):

- Full liquidation
 Partial liquidation \$ _____

5. Required Minimum Distribution (Required for clients age 70 1/2 or older):

If you are or will reach age 70½ or older in the calendar year you make this transfer, do you want Bank of America to distribute your Required Minimum Distribution (RMD) prior to the transfer?

- Yes, please distribute my RMD prior to completing this transfer
 No; I will be responsible for distributing my RMD
 Not Applicable; I have already taken my RMD for this year

6. Client Authorization:

I, the undersigned Client, authorize the transfer of the above-referenced account to Merrill Lynch, Pierce, Fenner & Smith Incorporated, which will act as successor custodian for my IRA. The transfer is to be accomplished in the manner indicated above.

Client signature: _____

Date (required): _____

Merrill Edge® is available through Merrill Lynch, Pierce, Fenner & Smith Incorporated ("MLPF&S"), and consists of the Merrill Edge Advisory Center™ (investment guidance) and self-directed online investing.

MLPF&S is a registered broker-dealer, Member SIPC and a wholly owned subsidiary of Bank of America Corporation.

Investment products:

Are Not FDIC Insured

Are Not Bank Guaranteed

May Lose Value

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