Please complete this form and fax to 877.229.7160 or mail to:
Merrill Document Processing
PO Box 31024
Tampa, FL 33631-3024

For faster service, this form can be completed electronically by signing into your account on merrilledge.com.

You may also call Merrill at 877.653.4732 with any questions.
Representatives are available to assist you 24 hours a day, 7 days a week.

Merrill

Authorization to transfer funds from a bank retirement account

Bank of America IRA to Merrill IRA transfers only

Note: Merrill account type and resigning account type must match.

1. Transfer funds to:

Merrill Retirement account number

Client's last name, first name, middle initial

Merrill account type (required; 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 (required; please select one):

☐ Traditional/Rollover/SEP ☐ Roth IRA ☐ Inherited — IRA
☐ Inherited — Roth IRA

3. Liquidation options (required; 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 (required; please select one):

☐ Full liquidation
☐ Partial liquidation $ _____

5. Required Minimum Distribution (required for clients age 73 or older):

If you are or will reach age 73 or older in the calendar year you make this transfer, you may be required to distribute your Required Minimum Distribution (RMD). If you wish to withdraw your RMD prior to the transfer, please call 800.432.1000 prior to submitting this form.

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)

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Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value

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