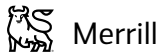


Please complete this form and fax to 866.994.7807 or mail to:
Merrill Document Processing
PO Box 14354
Lexington, KY 40512-4353

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.



Authorization to transfer funds from a bank retirement account

Bank of America IRA to Merrill IRA transfers only

1. Transfer funds to: 2. Transfer funds from:

Merrill Retirement account number

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

Client's last name, first name, middle initial

Social Security number

Merrill account type (required; please select one):

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

Resigning account type (required; please select one):

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

3. Liquidation options (required; please select one): 4. Full or partial liquidation (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.)

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, 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 Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BofA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BofA Corp.

Are Not FDIC Insured Are Not Bank Guaranteed May Lose Value

© 2023 Bank of America Corporation. All rights reserved. | SHEET-02-23-0315 | 00-66-0219NSB | 02/2023

To learn about Bank of America's environmental goals and initiatives, go to bankofamerica.com/environment. Leaf icon is a registered trademark of Bank of America Corporation.