

Trusted Contact Person Form

Merrill Lynch, Pierce, Fenner & Smith Incorporated (“Merrill Edge”) encourages you to designate a trusted contact person by completing this form.

What is a trusted contact person?

A trusted contact person(s) is an individual (age 18 or older) identified by you, whom Merrill Edge could contact and disclose information about your account:

- to address possible financial exploitation;
- to confirm specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee, or holder of a power of attorney; or
- as otherwise permitted by Financial Industry Regulatory Authority Rule 2165 (Financial Exploitation of Specified Adults).

What if you previously completed a Contact Authorization Form?

Merrill Edge previously made available a Contact Authorization Form, which was similar to the Trusted Contact Person Form. If you completed a Contact Authorization Form, Merrill Edge will treat the contact person(s) you designated as your Trusted Contact Person(s). If you wish to add, update or remove a previously named contact person(s), please complete and return the Trusted Contact Person Form to the address noted below.

How do you add a trusted contact person?

Please complete this Trusted Contact Person Form, and return it to:

Merrill Edge
P.O. Box 29002
Hot Springs, AR 71903-9954

If you have questions or would like help completing the form, please call the Investment Center at **877.653.4732**.

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

Trusted Contact Person Form

Please accept this document as instruction to add a trusted contact person(s) to the following 8-digit Merrill Edge® Account Number and all other accounts at Merrill Edge® for which I am either account owner or an authorized person.

Name of account owner Mr. Mrs. Ms. Dr. Suffix: Sr. Jr. Merrill Edge account number:
(first, middle and last)

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PRIMARY TRUSTED CONTACT PERSON INFORMATION

Name of trusted contact person Mr. Mrs. Ms. Dr. Suffix: Sr. Jr. Relationship (e.g., spouse, child, holder of my power of attorney, lawyer, accountant, etc.)
(first, middle and last)

Street address Work phone Home phone

Mobile phone

City State ZIP Email

ALTERNATE TRUSTED CONTACT PERSON INFORMATION

Name of trusted contact person Mr. Mrs. Ms. Dr. Suffix: Sr. Jr. Relationship (e.g., spouse, child, holder of my power of attorney, lawyer, accountant, etc.)
(first, middle and last)

Street address Work phone Home phone

Mobile phone

City State ZIP Email

I understand that (1) I may designate multiple trusted contact persons (use additional copies of this form); (2) Merrill Edge is not required to contact my trusted contact person(s) but may at their discretion contact one or more of the people I have designated as trusted contact person(s); (3) the completion of this form is optional and I may withdraw it at any time by notifying Merrill Edge in writing (use Merrill Edge address as shown on the previous page or Merrill Edge address shown on account statement). If I would like to change my trusted contact person, I may do so by providing Merrill Edge with a newly signed Trusted Contact Person Form with the box checked below to indicate that the new form supersedes any previous form(s).

Check here if this Trusted Contact Person Form supersedes previous Trusted Contact Person Form(s)

Signature

Printed name Date

Signature of client Date

¹ For purposes of this Trusted Contact Person Form, "Merrill Edge" means Merrill Lynch, Pierce, Fenner & Smith Incorporated and all of its affiliates.