

Please complete and return this form to:

Merrill Document Processing  
P.O. Box 14354  
Lexington, KY 40512-4353  
Or fax to: 866.994.7807



# Appointment of a successor custodian

Merrill Lynch, Pierce, Fenner & Smith Incorporated

Account number: \_\_\_\_\_

I, \_\_\_\_\_ hereby resign as Custodian over the above-referenced account.

I have appointed \_\_\_\_\_ as successor Custodian and he/she hereby accepts such appointment by signing below. The successor custodian will submit any other documentation that may be required.

I, \_\_\_\_\_ hereby accept the appointment of custodian.  
(New Custodian)

Please transfer all assets to new account number \_\_\_\_\_ (Required for Merrill Edge Self-Directed accounts)

For **Merrill Advisory Center accounts**, the new Custodian must submit a Fiduciary Client Relationship Agreement by faxing to 866.994.7807. Also, you will need to contact the Merrill New Account Support team at 888.657.8278, Option 1, from 8 a.m. to 8 p.m. Eastern, Monday through Friday, to complete the process.

For **Merrill Edge® Self-Directed accounts**, in lieu of the Client Relationship Agreement, the new Custodian can visit [merrilledge.com](http://merrilledge.com) to establish a new custodial account. Once the new account is established, please contact our Distributions team at 888.654.6837 to have funds transferred. Associates are available 8 a.m. to 8 p.m. Eastern, Monday through Friday.

Sincerely,

\_\_\_\_\_  
Resigning Custodian

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Successor Custodian

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date

**Note:** If resigning custodian and successor custodian are signing together, then only one witness is required. If signing separately, two witness signatures are needed.

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