



Bank of America Corporation

# Appointment of a Successor Custodian

**Merrill Lynch, Pierce, Fenner & Smith Incorporated**

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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.

Please transfer the entire balance from account \_\_\_\_\_ to the new custodian's account \_\_\_\_\_.

For **Merrill Edge Advisory Center™ accounts**, the new custodian must submit a Fiduciary Client Relationship Agreement by faxing to 866.994.7807. Also, the resigning custodian will need to contact the Merrill Edge® Onboarding team at 888.657.8278, Option 1, from 8 a.m. to 11 p.m. Eastern, Monday - 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** to establish a new custodial account. Once the new account is established, please contact our Distributions team at 888.ML.INVEST (888.654.6837) to have funds transferred. Associates are available 8 a.m. to 8 p.m. Eastern, Monday – Friday.

Sincerely,

\_\_\_\_\_

Resigning custodian

\_\_\_\_\_

Successor custodian

\_\_\_\_\_

Witness

\_\_\_\_\_

Date

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 ("BofA Corp.").

Banking products are provided by Bank of America, N.A. and affiliated banks, Members FDIC and wholly owned subsidiaries of BofA Corp.

Investment products:

<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
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