

Please complete and return this form to:

Merrill Document Processing
PO Box 31024
Tampa, FL 33631-3024
Fax: 1.877.229.7160

Please call Merrill at 877.653.4732 with any questions.

Representatives are available to assist you 24 hours a day, 7 days a week.



Successor custodian appointment form, by minor

Please note: This form is to be used **only** for UTMA/UGMA Retail accounts, when **all** of the following apply:

- 1)** The minor has reached age of 14 (12 for Connecticut), **2)** there is no recorded successor on file **and**
- 3)** the current custodian is no longer able to act as custodian.

Account number: _____

I, _____, hereby appoint _____ as custodian
(Minor's name) *(Custodian's name)*

over my UTMA/UGMA account. I, _____ accept custodianship over the account,
(Custodian's name)

as I have been chosen to be the new custodian.

The new custodian will submit any other documentation that may be required.

For Merrill Advisory Center™ accounts, the new custodian must submit a Fiduciary Client Relationship Agreement by faxing to 866.994.7807, as well as speak with the Merrill New Account Support Team at 888.657.8278, Option 1, from 8 a.m. to 11 p.m. Eastern, Monday through Friday, to complete the process. If applicable, the new custodian can instead elect to transfer the assets to a previously existing/newly established account, identical in title, for the named minor.

For Merrill Edge® Self-Directed accounts, in lieu of the Fiduciary Client Relationship Agreement, the new custodian is required to move assets to a previously existing/newly established account, identical in title, for the named minor.

The new custodian can visit merrilledge.com or call in to establish a new custodial account. Once the new account is established, please complete the Transfer section below as applicable and/or 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.

If electing to transfer to new account, or as required to transfer to new account (for Merrill Edge® Self-Directed accounts), please

provide the new account number: _____
(new account number)

Minor's signature	Date	Witness's signature	Date
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New custodian's signature	Date
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NOTE: Additional transfer documents, verification and contact may be required.

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Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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