



# Agent Profile for Power of Attorney

An Agent is the individual or entity to whom the account holder grants limited authority. This standalone Agent Profile Form must also be submitted with all Power of Attorney (POA) documents such as State-Specific POA documents or Outside Non-Merrill Power of Attorney Documents. A separate Agent Profile Form must be completed for each Agent.

## INSTRUCTIONS:

- Agent name in POA document must match the Agent Profile Form.
- Account number(s) in POA document must match the Agent Profile Form.
- Only a wet signature is accepted. Requests with a digital signature will not be processed.
- Each agent being added requires their own Agent Profile Form.

## MERRILL ACCOUNT NUMBER(S) FOR WHICH POWER OF ATTORNEY IS BEING APPLIED

**X DO NOT PROCEED** for the following account types: Merrill Lynch Wealth Management, Merrill Guided Investing, business accounts, 529, Educational Savings, and deceased customer accounts.

- |   |   |   |
|---|---|---|
| 1. <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | 2. <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | 3. <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| 4. <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | 5. <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | 6. <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |

## AGENT PROFILE (all questions are required)

Agent's name \_\_\_\_\_

Agent's SSN or TIN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Agent's date of birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Agent's occupation \_\_\_\_\_

Name of Agent's employer/company \_\_\_\_\_

Agent's relationship to account holder \_\_\_\_\_

Agent's telephone number ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_

Agent's email address \_\_\_\_\_

Agent's residential address:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Agent's mailing address (If mailing address is different than the residential address, please list below):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Continued on next page

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Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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## AGENT PROFILE (required)

Is Agent a U.S. citizen?

Yes, I am a U.S. citizen. (Proceed to Affiliation Information)

No, I am not a U.S. citizen. Please supply a copy of your passport and permanent resident card and answer remaining questions.

Agent's passport or national ID number \_\_\_\_\_

Type of passport: \_\_\_\_\_ Military    Diplomatic    Standard

Type of national ID \_\_\_\_\_ Country that issued passport/national ID \_\_\_\_\_

Passport/ID issued: \_\_\_\_ / \_\_\_\_ / \_\_\_\_    Passport/ID expires: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
MM    DD    YYYY    MM    DD    YYYY

## AFFILIATION INFORMATION (Both questions contained in this section must be answered.)

1. Is the Agent, his/her spouse or another member of their household employed by Merrill, Bank of America and its affiliates, a broker dealer, self-regulatory organization, or another financial institution?

Yes    No

If yes, relationship:

Member of household

Self

Spouse

Institution:

Merrill Lynch, Pierce, Fenner & Smith

Bank of America Corporation

Other institution / Clearing company name (complete line below)

Name of other institution: \_\_\_\_\_

2. Is the Agent a director, 10% shareholder or someone who has the ability to control corporate action or policy of a public company?

Yes    No

Company name \_\_\_\_\_ Symbol: \_\_\_\_\_

If the stock is unlisted, enter "NLIST" as symbol

If the Control Person has more than one (1) Control Person Company and Symbol, use the Client Profile Supplemental Page for Control Person Company to list them all. Use as many additional pages as needed.

## AGENT SIGNATURE (NOT ACCOUNT OWNER) (required)

By signing this form, I represent and agree that statements and information contained in this document are accurate.

Agent signature \_\_\_\_\_ Date \_\_\_\_\_

If you have any questions, please contact the Merrill Investment Center at 888.654.6837 between 8 a.m. and 8 p.m. Eastern, Monday through Friday, and representatives can connect you with the Power of Attorney team.

**Please return this form and other required Power of Attorney documents within 30 days by one of these means:**

- Clients with Online IDs can use the Secured Message Portal through the Merrill website
- By fax to 877.229.7160 (faxes will reflect as received within 48 hours)
- By mail: Merrill Document Processing, PO Box 31024, Tampa, FL 33631-3024

GATHER CLIENT INFORMATION

SUPPLEMENTAL PAGE FOR CONTROL PERSON COMPANIES

Use this page to enter additional Control Person Companies and Stock Symbols that do not fit in the Control Person fields in the main body of the Agent Profile Form.

Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
Company name	Symbol
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