



Letter of authorization — Read Only and Trading or Ownership

A client may grant their Power of Attorney (POA) three types of online account access: view only, online trading authority, or online ownership-level authorities. **In order to proceed, the POA paperwork must be approved by Merrill, the POA must have an online Merrill login, AND the client must complete this form (not the POA).**

- For **view-only access** to a third party, log into your website, visit “Help & Settings”, then “Provide Account Access.”

For faster service, this form can be completed electronically by signing into your account on merrilledge.com. Alternatively, you can fax this completed form to 877.229.7160 or mail to:

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

1. ACCOUNT NUMBER(S): - -

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2. ACCOUNT HOLDER’S FIRST/LAST NAME: _____

3. POWER OF ATTORNEY’S ACCOUNT NUMBER (POA must be appointed before this form can be completed):

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4. POWER OF ATTORNEY’S MERRILL ONLINE USER ID _____ (POA must have an existing Merrill relationship to be granted online access):

5. I wish to grant (POA First/Last name) _____ **access to** (Select only one. If both options are selected, the highest level of authority will be granted if eligible):

Read Only & Trading status for online capability on my account(s) listed above.

- For both a retirement and CMA account, the client must initial at least the purchases, sales and durability powers in order for the POA to be able to view and trade on the account.
- I understand they will now have authority to view the account activities online and are limited to Trading only.

Or

Ownership status for online capability on my account(s) listed above.

- For both a retirement and CMA account, the client must initial all powers in order for the POA to have ownership access. I understand they will now have transactional access, which will include the ability to place trades, move money, transfer securities and suppress all mailings to his/her own email address.
- **NOTE:** Trust accounts are only eligible for Read Only and Trading status

I/We agree to alert Merrill in writing immediately if this Agent should no longer have access to my/our accounts online so that their access may be terminated. I/We understand that Merrill will continue to allow the Agent to have online access to my/our accounts until it receives written notice to terminate such access. I/we represent, warrant and attest that I/we am/are executing this document as an authorized signatory for the account listed on this form.

Note: Only the client may complete and sign this form. Forms that are completed and signed by a Power of Attorney will not be accepted.

Client’s signature: _____ Date: _____

Client’s signature: _____ Date: _____

If you have any questions or need additional information, please contact our Investment Center at 877.653.4732. Representatives are available to assist you 24 hours a day, seven days a week.

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Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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