

To help ensure your request is processed in a timely manner, include all the information listed below and return to
Merrill Document Processing
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Action required

Letter of authorization — Read Only and Trading or Ownership

Thank you for your recent communication with Merrill. To grant Read Only and Trading or Ownership status for online capabilities on your account, please complete this letter of authorization.

Account number: - Client's name: _____

Power of Attorney (POA) name (**NOTE:** A POA must be appointed before this form can be completed.): _____

POA's account number (**NOTE:** A POA must have an existing Merrill relationship in order to be granted online access.):

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IMPORTANT

Please select one of the two options below:

☐ I wish to grant _____ access to Read Only and Trading status for online capability on my account. POA's Merrill online user ID

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.

☐ I wish to grant _____ access to Ownership (OW) status for online capability on my account. POA's Merrill online user ID

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: POA on Trust accounts are only eligible for Read Only + 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.

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.

Sincerely,

Client's signature: _____ Title: _____ Date: _____

Client's signature: _____ Title: _____ 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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