

Vested minor taking possession of assets

This form is to be used when the named minor has **surpassed** the vesting (termination) age.

Account number: _____
(Existing UTMA/UGMA account number)

I, _____, have surpassed the state-mandated vesting age and hereby instruct Merrill to transfer the
(Vested minor's name)
account's assets to me in the following manner:

Transfer all assets to my Merrill account:

(Vested minor's new account number)

OR Close the account by sending a check for the balance of the account to the address listed below:

(Street address)

(City, state, ZIP)

OR

Federal Funds Wire Transfer

IMPORTANT INFORMATION REGARDING FEDERAL FUNDS WIRE TRANSFERS:

If you are transferring into your personal or joint Bank of America account, please provide the account number only. If you are transferring into an account at another institution, please complete the entire section. A fee will be charged for federal funds wire transfers to a non-Bank of America account and will be deducted from the gross amount if additional cash is not available.

Please provide the receiving bank and account information. Please contact your receiving bank for proper instructions, as all banks' receiving instructions vary. Federal funds wire transfers and account-to-account transfers typically take 24 to 48 hours to process.

Bank Name

Bank ABA Routing #

Name on Receiving Account

Account Number

This box only needs to be completed if intermediary bank instructions are required.

For Further Credit to (if applicable)

Name on Account

Account Number

Swift Code (for international wires)

Specify Currency

Misc. Instructions (i.e., home closing information)

If the wire transfer is being made to alternate payee, indicate the final recipient's city and country of residence below:

Recipient's City of Legal Residence

Recipient's Country of Legal Residence

(Please contact your bank to confirm these instructions are correct. Merrill is not responsible for a failed transfer due to incorrect instructions which may result in additional fees and/or a delay of your transfer.)

(Continued on following page)

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Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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NOTE: Check or Wire will be sent in the name of the minor; all assets must be liquidated prior to the processing of a check request. If you wish to liquidate or have any questions, please contact us 24/7 at 877.653.4732. One of our associates will provide further assistance. Be sure to have your account number available when you call.

Signature

Date

Vested minor's primary contact number

**A government-issued photo ID
is required for each signature
represented, if one has not
been previously provided.**

For faster service, this form can be completed electronically by signing into your account on merrilledge.com. Alternatively, you can fax all pages to 866.994.7807.

Or mail to:
Merrill Document Processing
PO Box 14354
Lexington, KY 40512-9706