

# 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 close the account  
(Vested minor's name)  
and transfer the account's assets to me in the following manner:

Transfer all assets to my Merrill account: \_\_\_\_\_ **OR** Send a check for the balance of the account to the address listed below:  
(Vested minor's new account number) \_\_\_\_\_  
(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 \_\_\_\_\_

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.)**

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 \_\_\_\_\_

*(Continued on following page)*

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Investment products:

<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
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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](https://merrilledge.com). Alternatively, you can fax all pages to 1.877.229.7160.

Or mail to:  
Merrill Document Processing  
PO Box 31024  
Tampa, FL 33631-3024