

# Letter of Authorization for Name Mismatch



Use this form for any name differences between accounts held at Merrill Edge and another institution. This form must be stamped by the other institution or a third party.

## When using this form:

- All signatures on this form must be guaranteed by a Medallion Signature Guarantor stamp.
- This stamp is available from most banks, credit unions and other financial institutions.
- Merrill Edge **cannot accept** guarantees from a notary public or non-Medallion program guarantors.
- Please only use one form per account holder who has a name discrepancy requiring authentication.
- For visibility purposes we recommend using **black ink** when completing this form.

## Merrill Edge account number

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I hereby verify that: \_\_\_\_\_, and \_\_\_\_\_, are the same person.  
Print name Print name

I agree to indemnify, defend and hold harmless Merrill Lynch, Merrill Edge and Bank of America, N.A., their affiliates, officers, agents and employees, from and against any and all claims, losses, suits, liabilities, creditor claims, damages, costs or expenses, including but not limited to reasonable attorney's fees, asserted against or sustained by Merrill Lynch, Merrill Edge, Bank of America, N.A., and their affiliates, officers, agents and employees, at any time, in any jurisdiction, at law or equity, whether known or unknown, matured or unmatured, liquidated or unliquidated, absolute, fixed or contingent, arising from or based upon or in any way related to Merrill Lynch's compliance with and reliance on the above representations, acting on the instructions contained on this form.

Please sign your name **BOTH** ways:  \_\_\_\_\_  \_\_\_\_\_

Sign your name exactly as it is written in the section above, but only in the presence of an authorized officer providing the Medallion stamp.

## Medallion Signature Guarantee Stamp

\_\_\_\_\_  
Name of institution

\_\_\_\_\_  
Date (MM-DD-YYYY)

Medallion Signature Guarantee — Place stamp below

Once this form is stamped, return this original form and enclose any account transfer documents via:

### Standard Mail:

Merrill Edge  
Attn: Client Onboarding  
P.O. Box 1528  
Pennington, NJ 08534-1528

### Overnight Mail:

Merrill Edge  
Attn: Client Onboarding  
1400 American Boulevard, Floor 1  
Pennington, NJ 08534

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<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
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