Merrill Texas designation form
for unclaimed property notifications

Account number(s): — — — — — — — — — — — — — — — — — — — — — — — —

This form may be used to name a designee to receive abandoned property notifications on your account(s) with a mailing address in the state of Texas. Only one designee is allowed per account.

Account owner information:
Only one account owner is required to complete this section regardless of the number of account owners on the account.

Client name

Address line 1

Address line 2

Phone number

City ____________________________ State ________ ZIP _______________________

Designee information:
Only one designee is allowed per account.

Designee name (only one per client)

Address line 1

Address line 2

Phone number

City ____________________________ State ________ ZIP _______________________

Please see reverse side for required acknowledgement and signature requirements.

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Investment products:

| Are Not FDIC Insured | Are Not Bank Guaranteed | May Lose Value |

Code: TXDESIGN 08/2022
Acknowledgement of the appointment of a designee

I hereby acknowledge and agree that, in addition to the notifications being sent to all account owners, copies of any abandoned property due diligence notices pertaining to the above-referenced account number(s) will also be sent to the designee listed above and I understand that these notices may contain my personal account information, including account number and balance.

Signature of account owner ________________________________

Printed name ________________________________ Date __________________

Certificate of Acknowledgment of Notary Public

State of ____________________________ County of ____________________________

The foregoing instrument was acknowledged before me, a Notary Public, this ____________________________ day of ____________________________, 20______

by ________________________________, the person(s) whose name(s) is subscribed to the within instrument and acknowledged to me that he/she executed the same in his/her/its authorized capacity(ies), and that by his/her signature(s) on the instrument the person(s) or entity(ies) upon which the person(s) acted, executed the instrument.

Please check one of the following (required):

☐ Personally known to me      Or  ☐ Produced identification

Type of identification produced ________________________________

WITNESS my hand and official seal

Signature of Notary Public ________________________________

Print name of Notary Public ________________________________

My commission expires ________________________________

Stamp or seal here