Please complete and return this form to:

Merrill Document Processing
PO Box 31024
Tampa, FL 33631-3024
Fax: 1.877.229.7160

Please call Merrill at 877.653.4732 with any questions.

Representatives are available to assist you 24 hours a day, 7 days a week.

Merrill

Successor custodian appointment form, by minor

Please note: This form is to be used **only** for UTMA/UGMA Retail accounts, when **all** of the following apply:

1) The minor has reached age of 14 (12 for Connecticut), **2)** there is no recorded successor on file **and**
3) the current custodian is no longer able to act as custodian.

Account number: ______________________________

I, ______________________________ (*Minor's name*), hereby appoint ______________________________ (*Custodian's name*) as custodian

over my UTMA/UGMA account. I, ______________________________ (*Custodian's name*) accept custodianship over the account,

as I have been chosen to be the new custodian.

The new custodian will submit any other documentation that may be required.

For Merrill Advisory Center™ accounts, the new custodian must return this form along with a Fiduciary Client Relationship Agreement. Once all documents are submitted in good order, the new custodian will need to contact the National Financial Services Solution Advisor Team at 888-637-3343, option 1, between 8 am and 10 pm Eastern, Monday through Friday. If the new appointment is due to death of the current custodian, contact Life Services at 855.450.9015 to assist. If applicable, the new custodian can instead elect to transfer the assets to a previously existing/newly established account, identical in title, for the named minor.

For Merrill Edge® Self-Directed accounts, in lieu of the Fiduciary Client Relationship Agreement, the new custodian is required to move assets to a previously existing/newly established account, identical in title, for the named minor.

The new custodian can visit merrilledge.com or call in to establish a new custodial account. Once the new account is established, please complete the Transfer section below as applicable and/or contact our Distributions team at 888.654.6837 to have funds transferred. Associates are available 8 a.m. to 8 p.m. Eastern, Monday through Friday.

If electing to transfer to new account, or as required to transfer to new account (for Merrill Edge® Self-Directed accounts), please

provide the new account number: ______________________________ (*new account number*)

Minor's signature	Date	Witness's signature	Date
New custodian's signature	Date		

NOTE: Additional transfer documents, verification and contact may be required.

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