



# Action required

## Letter of Authorization

**Instructions:** If you have an **existing** Merrill CMA brokerage account and are requesting to update the registration into a Trust account. Please complete this authorization form and include it with your Trust application or Client Relationship Agreement and Trustee Certification Form.

Merrill Account Number:

   -     

**Print names of all existing account owners**

I/We, \_\_\_\_\_

hereby request that the above account be changed to reflect the title of my/our Trust.

**Print the title of the Trust (e.g., The John and Jane Doe Revocable Trust)**

\_\_\_\_\_

By submitting this letter of authorization, I/we certify the following:

- Updating the account registration of the account to the above-named Trust will be in accordance with the terms of the Merrill Lynch Trustee Certification Form.
- I/we acknowledge that the addition of any new account owners to this account, as trustee(s), will assume beneficial ownership on the account.
- I/we acknowledge that the Trust will continue to use the same Tax Identification Number currently reflected on the above account for tax reporting purposes.

Signature of Existing Account Owner	Date	Signature of Existing Account Owner	Date
_____	_____	_____	_____
Signature of Existing Account Owner	Date	Signature of Existing Account Owner	Date
_____	_____	_____	_____

**Return all documents to:**

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

Overnight mail to:  
Merrill Document Processing  
FL1-908-01-36  
4909 Savarese Circle  
Tampa, FL 33634

Or fax to: 1.877.229.7160

If you have any questions, please contact the Merrill New Account Support Team at 844.677.2542, Option 3, between 8 a.m. and 8 p.m. Eastern, Monday through Friday. Be sure to have your account number or trust identification number available when you call.

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