

My Financial Picture is a free, secure service which provides you with a single snapshot of your financial information.

You can view your net worth, balances, holdings and activity for your accounts including:

- Merrill
- Bank of America
- Loan and credit cards
- External financial institutions
- And, real estate holdings

You may also Track your income and spending trends, and, view your expense analysis and transactions across all of your accounts.

Additionally, if you link your MyMerrill and Bank of America online banking through single sign-on, My Financial Picture will make the same financial information available to you on both sites!

There are several ways your financial information is kept secure in My Financial Picture:

- Only you have access to your external site credentials
- Your advisor will only see accounts you choose to share
- And, it is a read only view so no transactions can be processed.

Let's begin by enrolling in the feature on MyMerrill.com or Bank of America.com.

- Once logged select My Financial Picture
- Next, Click on 'Enroll Now'
- Accept Terms & Conditions as well as choose whether you would like to share your added external accounts with your advisor.

You may change your sharing elections at any time.

Now that you are enrolled, let's explore adding accounts.

Note: your Merrill investment as well as your Bank of America Banking accounts will automatically appear if linked previously.

My Financial Picture supports more than 10,000 institutions such as:

- Banking and Investment accounts,
- Credit cards,
- Loans,
- Rewards and more...

In addition, other assets and liabilities not tracked on websites such as jewelry or other valuables may be added manually.

Each newly added account will start with 90 days of history

Using the Real Estate tab, you may enter the address of your choosing to automatically track current property values.

Once your external accounts are added, you may begin to explore the tool through the Net Worth, activity and budget pages.

Net worth displays your account details categorized by assets and liabilities.

The activity page allows you to view and customize your transactions which will be reflected in your personalized expense analysis under the budget tab.

Additionally, the manage tab allows you to update external account credentials under accounts and ensure you are sharing your accounts with your advisor.

Once enrolled, you may also access My Financial Picture from the MyMerrill app by tapping the menu icon, and choosing My Financial Picture from the Market, News & Tools section.

My Financial Picture is a powerful tool to help you and your advisor understand your complete total assets and liabilities.

### **Important Information:**

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### **Investment products:**

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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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