At Merrill we are committed to providing the best service possible and we understand the importance of having access to innovative tools and resources to support your financial life.

Many of the benefits, features, and advisor collaboration opportunities that exist are demonstrated on our MyMerrill preview site and mobile app. Whether you're ready to begin engaging in a conversation with your prospective advisor about your life priorities and financial goals or just interested in the many digital capabilities that Merrill has to offer, the perfect place to start is MyMerrill.

The preview provides you with a unique experience designed to show you what Merrill has to offer including features such as:

- An overview of our personalized goals based wealth management approach that has been designed to help you focus on the goals and priorities that are most important to you
- You may take advantage of My Financial Picture ®, our free and secure asset aggregation service, which gives you a full view of your financial life
- Secure messaging capabilities to confidentially share information
- And a connection to your prospective advisor on every page.

You may access

- 20 minute delayed quotes
- Market news
- And the mobile app offers tools like document scanning for sharing documents securely.

Life Priorities provides you with resources, articles, and product information that Merrill offers to help you define the goals that matter most, to you.

On the Help Tab, you will be able to view your Login credentials, customize your site timeout setting, and review additional Login security features.

Access is easy. You will receive an email invitation from your prospective advisor. Click "Let's get started" to begin the online enrollment process. On the introduction page, click "Get Started."

- First, you will be asked to enter your personal information:
- Next, create a user friendly ID and password,
- Then select three security questions and answers
- Confirm and submit to log in
- Upon your initial login, you will be asked to accept the terms & conditions and open and review two required disclosure documents before you can complete your login.
- You will have an opportunity to use the prospect site for up to 180 days.

When you are ready to open your account,

- Our electronic signature capability is available to expedite the onboarding process.
- After you receive confirmation that your account is open – you may log into MyMerrill.com with the User Friendly ID that you created as a prospect.
- You will see your new account information along with previous messages and appointments from the prospect site,
- Additionally, you will see accounts you have added to My Financial Picture.

Explore MyMerrill today to see what Merrill has to offer!

Merrill is committed to investing in industry-leading technology to support your financial life. It's all a part of our commitment to you, and to improving your experience through every interaction.

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