

MyMerrill's Secure Inbox

Secure Inbox in MyMerrill allows you to safely communicate with your advisor team through MyMerrill.com and the mobile app.

This tool allows you to:

- Send, receive and reply to messages,
- Request and accept appointments,
- And, create and receive tasks

Let's first look at the website.

Once you are logged in, click on the "envelope" icon to view your messages.

You will be brought to the Timeline view of Communications tab which displays your notifications received in the last 90-days

New messages will appear in bold text with a red circle on the left. You may preview the message from this view

OR

Click on Secure Inbox at the top of this screen and select the Message to review it.

You may reply, delete, mark or move the message to another folder

As well as, mark meeting invitations as accepted, tentative, declined or even reply to them.

And, accept, decline or reply to tasks that are sent to you from your advisor team.

To create and send a message:

- Click "Compose New and select 'Mail Message"
- Select the recipient name(s) from the drop down menu
- Type the message and
- Click "Send".

Your message will be in your sent folder.

You may also attach documents in your message by clicking choose file.

Additional options under Compose New include:

Requesting an appointment with your advisor team. Once they accept it, they will send you a meeting invitation which you may download to your personal calendar.

And, creating a task for yourself

Accessing the Secure Inbox through your MyMerrill mobile app is just as easy.

Once logged in, tap the Messages icon to view your 90 day notification Timeline

Then select the message or tap Secure Inbox to view your messages, appointments and tasks.

Tap on Compose to send a new message to your advisor team.

To request an appointment or create a task, simply tap the menu icon and select Contact us under Help & support for these options

Secure Inbox ensures correspondence between you and your Advisor team is private and secure.

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