Authorize Account Access

Please see important information at the end of this video

MyMerrill's Authorize Account Access allows you to grant read-only visibility to authorized users such as an accountant, attorney, or a family member on any accounts you select, eliminating the need to print and mail statements to these individuals.

You can:

- Add as many authorized users as you want, there is no limit
- View - Modify – or Revoke access at any time
- To revoke access, simply select delete from the action dropdown and click 'Yes, delete'
- And, share certain documents securely using our document vault feature

As part of their access, they will be able to view:

- Balances
- Holdings
- Statements
- And, download account activity

They may not:

- Perform transactional capabilities such as a money transfer
- Communicate with your advisor, or
- View any external accounts added through our asset aggregation tool

Here's how it works-

Once you have logged into MyMerrill, select 'Account Access' to send an invitation.

- Click 'Get Started'
- Accept Terms and Conditions
- Enter the individual's name and email address
- Select relationship
- Select accounts to share
- Choose an access question for the authorized user to answer
- Review the authorized user's information, and
- Click submit to send the invitation

Once the Authorized user receives and accepts the invitation, they will be prompted to answer the access question.

Next, they will be asked if they have an existing MyMerrill user-friendly ID, which may be used to view your accounts. If they do not, they will be directed to create one.

Authorize account access provides a secure and efficient way to share your accounts with those who play an important role in your financial life.

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