Authorize Account Access

MyMerrill 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.
- And share certain documents securely using our Documents 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, click the help tab and then select 'Provide 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.

To revoke access, simply select 'delete' from the action dropdown and click 'Yes, delete.'

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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