

Secure Inbox

Please see important information at the end of this video

Secure Inbox allows you to safely communicate with your advisor team through MyMerrill online & mobile app AND the Bank of America mobile app.

This feature allows you to Send, receive and reply to messages

First, let's first look at MyMerrill online.

Once you are logged in, select Secure Inbox from the greeting menu to view your inbox.

From there, you may reply, delete, mark, or move messages to another folder

As well as request and reply to appointments.

And, accept, and 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'
- OR
- Click 'Send a Message'
 - Select the recipient names from the dropdown menu
 - Type the message
 - If attaching a document to your message, click 'Choose file', and
 - Click "Send".

Your message will be in your sent folder.

Additional options under Compose New include:

Requesting an appointment with your advisor team. Once they accept the request, 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 our mobile apps are just as easy.

Once logged in, tap the Messages icon then select Secure Inbox.

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 for these options

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

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