

e-Signature

MyMerrill's e-Signature enables multiple parties to sign forms digitally. It's easy and simplifies the processing of documents.

Let's walk through how it works.

- You will receive an email notification indicating a new message is in your secure inbox on MyMerrill. You will need to log into the site or mobile app to view the message in Secure Inbox and begin the process.
- Before you access the document, you may be prompted to click on a disclosure links depending on the form you are signing. You will also need to agree to terms and conditions.
- Upon accessing the form, you may add or edit fields before signing. If you are signing with the mobile app, you may pinch & zoom to enlarge the form.
- First time signers will be able to select from 2 font styles to create their e-Signature.
- Click Confirm and Continue to send to your advisor or next signer if prompted.
- You will immediately view a status screen for confirmation as well as receive a copy of the form once it is completed via a secure inbox message.

Here are some helpful tips.

- Additional signers without login credentials may authenticate themselves by entering their Social Security Number and Date of Birth before providing their e-Signature.
- Prior to processing, someone from your branch office may reach out to you to confirm your request.
- For financial transactions, funds need to be available at time of signature to prevent any processing delays.
- Should you choose to cancel your request, you may do so online, or, contact your Advisor.

e-Signature provides you with an electronic delivery method to simplify the flow of documents between you and your Advisor.

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