Client Digital Capabilities: Step-By-Step Instructions

Third Party Access - MyMerrill

Home

How to grant read-only access to third parties on MyMerrill:

1. Log on to MyMerrill® at http://www.mymerrill.com
2. Hover over the "Help" tab in the grey navigation bar at the top
3. Click on "Provide Account Access"
4. Click "Get Started" if you have never granted access before or click "Add another party" if adding an additional user
5. Review the Terms and Conditions and click "I Agree" to accept
6. Provide the first name, last name, e-mail address and relationship of the person you are granting third party access to and click "Next" to proceed
7. Select the account(s) to provide access to and click "Next" to proceed
8. Select one of the Access Questions and click "Next" to proceed
9. Review the Confirmation & Submit page and click "Submit" to complete the process
10. The person you have granted access to will receive an e-mail where they can then create their own User ID and Password to view your accounts online