

Client Digital Capabilities: Step-By-Step Instructions

Updating Personal Information

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How to update your personal contact information (Desktop):

1. Go to <http://www.mymerrill.com>
2. Hover over the “Help” tab in the top navigation bar
3. Click on “Update Personal Information”
4. Edit, delete, or add new e-mail addresses, phone numbers, or mailing addresses
 - a. When adding a new e-mail or phone number, you will be required to verify your identity using a one-time passcode.
 - b. For a phone number, indicate whether or not it is OK to send text messages. Change your preference by clicking “Change preference” beneath each phone number listed

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