

Client Digital Capabilities: Step-By-Step Instructions

Online Delivery

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To sign up for Online Delivery (Desktop):

1. Log on to MyMerrill® at <http://www.mymerrill.com>
2. Hover over the greeting at the top right of the page, select “Help & Settings” then “Paperless Settings” from the “Manage Accounts” section on the page.
3. Click “Go paperless for all documents” to set up online delivery for all accounts and all document types; OR
4. Click on the arrow next to “Manage Your Document Delivery Settings” to have the option of setting Standardized Delivery Instructions for each document type, which will set your delivery preference for all of your accounts. You also have the flexibility to customize delivery instructions for any account. You can select your delivery preferences for:
 - Statements
 - Performance reporting
 - Shareholder notices
 - Trade confirmations
 - Notices and disclosures
 - Prospectuses
 - Tax Reporting
5. Click “Save Settings”
6. In the pop-up window, review and agree to the Terms & Conditions
 - If there is another account owner, you will have to enter in that account owner’s e-mail address so they can also agree to the Terms & Conditions

To sign up for Online Delivery (Mobile App):

Note: Signing up for Online Delivery via the mobile app will set all delivery preferences for all accounts to go paperless

1. Log into the My Merrill Mobile App
2. Tap on “Menu”
3. Tap on “Statements & Documents”
4. Tap on “Manage Paperless Settings”
5. Switch the button to “on” to receive email notifications for all documents available online

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