Client Digital Capabilities: Step-By-Step Instructions

Digital Signature Suite: e-Signature

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Using e-Signature to electronically sign a form provided by your Advisor (Desktop):

1. You will receive an e-mail to your personal e-mail account indicating that you have a new request to review in your Secure Inbox
2. Click "View Request" in the e-mail to be taken to the log-in screen for MyMerrill, or go directly to http://www.mymerrill.com
3. Log into MyMerrill
4. Click on the envelope icon in the top right corner to access the Secure Inbox or hover over the "Communications" tab and select "Secure Inbox"
5. Find and open the e-mail indicating that you have a new document requiring your electronic signature
6. Click on the blue "View Request" button
7. Review each of the required disclosures and then click "Continue"
8. Review the form and make any changes, updates or additions to the document. Required fields are highlighted in red
9. Click the "Sign" button next to the signature line(s)
10. Click "Confirm & Continue" to submit your form
11. When there are 2 signers required:
    - If the co-signer is immediately available, the logged in signer can select "Complete form now" and they will be immediately logged out of MyMerrill for the co-signer to log in and complete the form
    - If the co-signer is not available, the logged in signer may select "Send to co-signer" to send a reminder notification to the co-signer on the request. A personal message can also be included in the reminder notification

Using e-Signature to electronically sign a form provided by your Advisor (Mobile App):

1. You will receive an e-mail to your personal e-mail account indicating that you have a new request to review in your Secure Inbox
2. Click "View Request" in the e-mail to launch the mobile app or go directly to the MyMerrill mobile app
3. Click on "Secure Inbox"
4. Find and open the e-mail indicating that you have a new document requiring your electronic signature
5. Click on the blue "View Request" button
6. Review each of the required disclosures and then
7. click "Continue"
8. Review the form and make any changes, updates or additions to the document. Required fields are highlighted in red
9. Click the "Sign" button next to the signature line(s)
10. Click "Confirm & Continue" to submit your form
11. When there are 2 signers required:
    - If the co-signer is immediately available, the logged in signer can select "Complete form now" and they will be immediately logged out of MyMerrill for the co-signer to log in and complete the form
    - If the co-signer is not available, the logged in signer may select "Send to co-signer" to send a reminder notification to the co-signer on the request. A personal message can also be included in the reminder notification