

# Client Digital Capabilities: Step-By-Step Instructions

## MyMerrill Alert Settings

[Home](#)

### Turn on/off alert settings in MyMerrill (Desktop):

1. Log onto MyMerrill at <http://www.mymerrill.com>
2. Hover over the “Help” tab in the top navigation bar
3. Click on “Alert Settings”
4. View a timeline of all triggered alerts under the “Triggered Alerts” tab
5. Under the “Set Alerts” tab, choose between the following alert types:
  - Investment Alerts: Input a ticker symbol and click “Set New Alert”. Select the type of alert you wish to receive (price, earnings, ratings, etc.) and check the box next to the specific alert. Click “Submit” at the bottom when finished
  - Account Alerts: Choose which account you wish to set an alert for from the drop-down and click “Set New Alert”. Choose the type of alert you wish to receive and check the box next to the specific alert. Click “Submit” at the bottom when finished
  - Security Alerts: Set a password reminder alert and/or choose whether or not to be notified if your User ID is entered on a new computer or mobile device
  - Market Alerts: Choose from alerts that help you stay on top of market activity. Check the box next to the specific alert you wish to receive and click “Save” at the bottom
6. To view/change the e-mail that should receive alerts, what types of alerts should be sent, when they should be sent, and how they should appear, click on the “Alert Delivery Options” Tab

### Turn on/off alert settings in MyMerrill (Mobile):

1. Log on the MyMerrill mobile app
2. Tap “Menu”
3. Scroll down and tap on “Alerts”
4. View a timeline of all alerts under the “History” tab
5. To turn delete an alert:
  - Tap on “Settings” and tap on the specific alert.
  - Turn off all toggles related to the alert and click “save”
  - It will prompt you and ask if you wish for the alert to be deleted
6. To set a new alert, tap on “Add Alert” and then choose between the following alert types:
  - Investment Alerts: Type a ticker symbol and tap on the ticker that populates. Choose the type of alert you wish to receive (price, earnings, ratings, etc.) and tap on the toggle next to the specific alert. Tap “Done” when finished
  - Account Alerts: Tap on the account you wish to set an alert for. Choose the type of alert you wish to receive by tapping the toggle next to the specific alert. Tap “Done” when finished
  - Security Alerts: Set a password reminder alert and/or choose whether or not to be notified if your User ID is entered on a new computer or mobile device
  - Market Alerts: Choose from alerts that help you stay on top of market activity. Tap the type of alert you wish to receive and then tap on the alert settings and tap “Done” when finished

Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as “MLPF&S” or “Merrill”) makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation (“BofA Corp.”). MLPF&S is a registered broker dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BofA Corp.

Banking products are provided by Bank of America, N.A., and affiliated banks, Members FDIC and wholly owned subsidiaries of BofA Corp.

Investment products:

<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
-----------------------------	--------------------------------	-----------------------