

# Client Digital Capabilities: Step-By-Step Instructions

## MyMerrill Enrollment

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### Desktop Enrollment (Client Initiated):

1. Go to <http://www.mymerrill.com>
2. Click “Enroll for Online Access” in the secure log-in box
3. Follow the instructions to validate your:
  - Account Number
  - Social Security Number
  - E-Mail Address
4. Receive an authorization code via text or phone call for final authentication
5. Create a user friendly ID and password OR use your Benefits Online ID/Password
6. Select and answer 3 security questions
7. Confirm elections with an option to link other owned Merrill Accounts
8. Click “Submit”
9. A pop-up box will ask you to log in and accept terms and conditions an indicate your non-professional user status
10. Choose whether or not to enroll in online delivery for all of your accounts

### Mobile App Enrollment (Client Initiated):

**Note: you must have the app downloaded from your device’s app store**

1. Click “Enroll”
2. Follow the instructions to validate your:
  - Account Number
  - Social Security Number
  - E-Mail Address
3. Receive an authorization code via text or phone call for final authentication
4. Create a user friendly ID and password OR use your Benefits Online ID/Password
5. Select and answer 3 security questions
6. Confirm elections with an option to link other owned Merrill Accounts
7. Click “Submit”
8. A pop-up box will ask you to log in and accept terms and conditions an indicate your non-professional user status
9. Choose whether or not to enroll in online delivery for all of your accounts

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