Online Delivery

With Online Delivery, it is possible to “go paperless,” to receive statements and account notifications via MyMerrill conveniently, quickly, and safely. It is a great choice that can save time and paper, while increasing the safety of your records.

There are 7 types that can be delivered electronically:

- Statements,
- Notices and Disclosures,
- Performance Reports,
- Prospectuses,
- Shareholder Notices,
- Tax Reporting
- and Trade Confirmations.

There are multiple ways to select your Paperless settings using MyMerrill.com and the MyMerrill mobile app.

Let’s first review MyMerrill.com. If you are logging into MyMerrill for the first time, you will be presented the ability to Go Paperless for all of your owned accounts. Any new accounts you set up under this User ID will automatically be added to your paperless settings. Review the terms & conditions and click “I agree” to complete the process.

If you have previously accessed MyMerrill, simply click the Help tab and choose “Go Paperless.” You have the flexibility to choose your delivery elections on *all* of your accounts or you can customize or change them at any time. Your preferences can be applied to future owned linked accounts. Once you are satisfied with your elections, click “I agree.” Then continue to complete the process.

You may also enable your Paperless settings for all owned accounts from the MyMerrill mobile app. Once logged in, select the menu option then “statements & documents,” select manage Paperless settings, tap the button to enable paperless delivery and accept terms and conditions. As an alternative, you may request your advisor to elect your online delivery preferences on your behalf. You will receive an email to approve any changes.

Now, let’s review how to access your account records. When documents are available for viewing, you will receive a notification to your primary email address. For your protection, we will never email documents, and will not include any personal or account information in the email alerts.

To view your documents, click the “Portfolio & Accounts tab,” select “Statements & Documents,” click on “Statements,” where you will find up to 7 years of records. Click on your monthly statement to open it. Once logged in the mobile app, tap on “Menu,” scroll to “Statements and Documents,” tap on “Individual Statements.” Your most recent monthly statement is available for you to view.

We encourage you to go paperless with online delivery. It’s convenient, efficient and secure, helping to make information more accessible to support your financial life.

Disclosure

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Investment Products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value

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