

## Go Paperless with Online Delivery

Please see important information at the end of this video

Online Delivery on MyMerrill allows you to "go paperless," and receive statements and notifications on all of your owned accounts conveniently, quickly, and safely.

There are 7 types of records that can be delivered electronically - Statements, Notices and Disclosures, Performance Reports, Prospectuses, Shareholder Notices, Tax Statements and Trade Confirmations

Enrolling is easy... there are no forms to fill out or papers to sign.

If you are logging into MyMerrill for the first time, you will be asked to Go Paperless for all of your accounts. Any new accounts you set up under this User ID will automatically be added to your paperless settings.

Next, review the terms & conditions and click "Continue" to complete the process.

If you have previously accessed MyMerrill, simply click Statements & Documents from the Accounts 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 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 accounts from the MyMerrill mobile app.

Once logged in, tap the menu icon then "statements & documents,"

Select manage Paperless settings, to enable paperless delivery and accept terms & 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.

Up to 7 years of records can be accessed only on MyMerrill, on the Statements and Documents page. Select the statement of your choice to open it.

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.

**Important Information:**

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**Investment products:**

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