

# Merrill Edge® Self-Directed Investing Phone Services — Reference Guide



Access your Merrill Edge self-directed investing account 24/7 through one convenient phone number: **877.653.4732**.

## Getting Started

### STEP 1

When prompted, speak or enter your authentication responses associated with your account.\*

### STEP 2

Begin making your selections by speaking them, or press the "\*" key to use touch-tone for your responses.

### Helpful Hints

- For optimal voice navigation, please speak clearly in your natural tone, minimize background noise and avoid speakerphones.
- You may interrupt the menu at any time to speak your commands.
- From the main menu, you can navigate anywhere in the system by speaking a command or pressing a touch-tone key.
- Once you begin using touch-tone commands, you must proceed in touch-tone mode for the duration of the call and vice versa.

\* Your authentication responses could be one of the following options (the last four digits of your SSN, a Relationship PIN, a telephonic security code or a Tax ID code) and must be entered when prompted if you are using a touch-tone mode.

## Automated Main Menu

Here are some VOICE commands that are recognized after you identify yourself via your account info.

"Automated account services"	For automated account activity, balances, funds transfer and to personalize the automated phone system
"Quotes"	For stock and market index quotes and to access your stock list
"Trading assistance"	To trade equities, exchange-traded funds (ETFs) or other securities via an associate (you can also execute trades through our automated system)
"Service associate"	To receive assistance at any time from a representative
"Different account"	To switch to another account

## Sub Menu

Automated account services	<ul style="list-style-type: none"><li>• Balances, holding, recent activity</li><li>• Withdrawals/distributions</li><li>• Deposit mailing address</li><li>• Personalize the automated phone system</li></ul>
Quotes	<ul style="list-style-type: none"><li>• Quick quotes, expanded quotes, portfolio quotes</li><li>• Stock list setup</li><li>• Review stock list, if applicable</li></ul>
To place a trade	<ul style="list-style-type: none"><li>• Place a trade through an associate with "Trading Assistance"</li><li>• Automated trading</li></ul>

Merrill Edge® is available through Merrill Lynch, Pierce, Fenner & Smith Incorporated (MLPF&S), and consists of the Merrill Edge Advisory Center™ (investment guidance) and self-directed online investing.

MLPF&S is a registered broker-dealer, Member SIPC and a wholly owned subsidiary of Bank of America Corporation.

Investment products:

**Are Not FDIC Insured**

**Are Not Bank Guaranteed**

**May Lose Value**

## General Commands

To move ahead more quickly, press or say the menu option you want at any time. The following commands are always available from anywhere in the system:

For:	Say:
Previous menu	"Go back"
Repeat menu	"repeat"
Return to the main menu	"Main menu"
Speak to a service associate	"Service associate"

## Entering Touch-Tone Security Symbols

To enter a quote using a touch-tone keypad, each letter is comprised of two keystrokes. The first represents the associated number on the keypad. The second indicates the letter's position on that key (first, second, third). When you are finished entering the numbers associated with that letter, enter the "#" key. If there are multiple securities that match the combination, a list of securities will be provided.

**Please note the letters Q, R, S and Z do not follow this pattern, as noted in the table below.**

### Touch-Tone Conversion Tables for Symbols:

A = 21	E = 32	I = 43	M = 61	<b>Q = 11</b>	U = 82	Y = 93
B = 22	F = 33	J = 51	N = 62	<b>R = 72</b>	V = 83	<b>Z = 12</b>
C = 23	G = 41	K = 52	O = 63	<b>S = 73</b>	W = 91	
D = 31	H = 42	L = 53	P = 71	T = 81	X = 92	