

## MyMerrill's Digital collaboration

MyMerrill's Digital collaboration and e-Signature solution enables you and your advisor to complete and sign forms instantaneously. It's fast, easy and the simplest way to complete a form

Let's walk through how it works.

You will receive an email notification indicating a new message is in your Secure Inbox on MyMerrill.com. You will need to login to view the message and invitation to join the online session along with contact information.

Note: if it is within 15 minutes before or after the virtual meeting, you will receive a pop up to join.

Before you join the session, you may be prompted to click on disclosure links depending on the form you are signing. These links will open a separate window where you may review the disclosure documents. You will also need to agree to terms and conditions.

Each person will have their own unique color for their cursor and the ability to complete or edit the form simultaneously.

Once the form is completed, your branch will lock in the information entered so you can review then electronically sign the form.

First time signers will be able to select from 2 font styles to create their e-Signature.

After all parties have signed, you will click Confirm and Continue. At which point, your branch will view the signed form and exit the session to begin processing your request.

You will immediately view a status screen for confirmation as well as receive a copy of the form once it is completed via a secure inbox message.

Here are some helpful tips.

- Additional signers without login credentials may authenticate themselves by entering their Social Security Number and Date of Birth before providing their e-Signature.
- Prior to processing, someone from your branch office may reach out to you to confirm your request.
- For financial transactions, funds need to be available at time of signature to prevent any processing delays.
- Should you choose to cancel your request, you may do so online, or, contact your Advisor.

Digital collaboration with e-Signature provides you with an electronic delivery method to simplify the flow of documents between you and your Advisor.

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