

Audio Script

Disclosure:

Please see important information at the end of this video.

So, you've opened a new Merrill Edge Self-Directed account. It's a great first step, and even though investing for the first time can feel daunting... it doesn't have to. So, I'm here to show you the ropes. I'm going to do everything on my screen, so you can see how it works.

First thing is funding your account. It's actually pretty simple... and if you're already a Bank of America client, it's even easier.

Your checking... savings... they're already there. And if they're not, you can link your accounts up like this.

You can also transfer money, online or on mobile, right into your account from other banks. Or move investments from other brokerages whenever you want.

And if you want to automatically put money into the account every month or maybe consolidate other retirement accounts, all of that's on the table too.

Once you have money in the account, you're on your way. Next, a lot of people download the mobile app. It's right in the App store, or you can just go to MerrillEdge.com on your phone or tablet. It's the same username and password you've already set up for your account.

Now you can manage your investments and transfer money wherever you are. So, when you log in, you'll end up here. It's your home page; kind of a snapshot of your accounts. And these are quick tabs for the things you probably want to see first. Holdings... activities... dividends...

And right at the top is where you can make things happen, whether you're still researching... or ready to make a trade.
Speaking of which... let's do this. Now, I am not offering you a stock tip... just showing you what it looks like to make a trade.

So, let's say you need a little more help. No worries. Most people do. It's right here. You'll find guidance at every step along the way.

After all, just because you're doing it yourself... doesn't mean you have to do it alone. There's a quick start guide... and 24/7 support.

So that's it. That's all it takes to get started. What you do next... is up to you. Thanks for watching, and thanks for choosing Merrill.

Disclosure:

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Asset allocation, diversification and rebalancing do not ensure a profit or protect against loss in declining markets.

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