

Audio Script

Disclosure:

Please see important information at the end of this video.

When it comes to investing, everyone does it a little differently. It's not like there's only one "right" way. So now that you've funded your Merrill Edge Self-Directed account, you get to decide what approach works for you.

But I'm not here to tell you what to invest in. I'm just going to show you a few of the ways you can get the information you need, and start investing. And I'll do it on my screen, so you can see exactly how it works.

So, most people already know how much money they're willing to invest when they start. But the question you're probably asking is "What do I want to invest in?"

There are all kinds of options. But some of the most common ones are stocks, Exchange Traded Funds, or as the pros like to say "ETFs", Mutual Funds, and fixed income assets like Bonds.

Now it's totally okay if you don't know what all of those things are. Because under the Guidance & Retirement tab, you'll find links like "Investor Education" and "New to Investing" that will help you both understand your choices, and set your priorities.

Spend some time reading up or watching the videos. They could give you an idea of where to start. And think about when you're going to need the money you're investing. For example, are you looking to redo your kitchen in a few years, or are you saving up for retirement?

Also, be realistic about how much risk you're comfortable taking. Putting your money in different types of investments can manage risk... but risk is always a part of investing.

Okay, so once you've set those guardrails, it's time to figure out what to invest in.

These ideas can come from anywhere, from the morning news to a personal connection. But if you're at MerrillEdge.com, the place to start is the Research tab.

You can get information and insights about markets, or take a look at lists of stocks, mutual funds and ETFs that have been put together by investment experts. You can even find investment ideas that align with the things you care about most.

And once those ideas come into focus, you can go deeper to get the story behind the stock or fund.

You'll find it here, in the overview. With a click, you can page through, step by step, and learn more about the company or fund, and look at past performance and current ratings.

Now let me be clear... this stock does not exist. It was made up for this video. I am not here recommending anything... except doing your homework. But of course, once you get into browsing stocks stories, it might not even feel like homework at all.

But let's say that after looking through a stock story, or any of the other research, you're ready to make a trade. Well that process starts right up here.

You'll enter the symbol in this space. And start filling out the trade ticket with the details like "buy" or "sell" and how many shares you're trading.

If you're looking to make the transaction right away, the order type you want is "Market." Any of the choices will only make a trade go through if the price goes higher or lower than an amount you set in your order.

But that's more advanced trading. You can click the "help" link right from the trade page to learn more about any of them.

Lastly, preview your order and double check it. Then confirm... and you've made your trade. And once you've begun trading, you can monitor all your holdings in one place.

This is your portfolio story, where you can look at past performance, and even watch a short video about your portfolio.

So, those are the basics, from deciding what kind of investment fits you, all the way through making a trade. And if you ever have questions, you can call, message, or chat anytime from MerrillEdge.com or the Merrill App.
Welcome to investing with Merrill. Thank you for watching.

Disclosure:

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Investing involves risk. There is always the potential of losing money when you invest in securities.

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

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