

Return form to:

Merrill Document Processing
PO Box 31024
Tampa, FL 33631-3024
Or fax to: 877.229.7160



Review and return — adding online access

Please sign and return the enclosed Online Account Access Authorization Form to complete your request to provide an interested party with online viewing access to your account.

Allowing someone to view and download account information by signing the enclosed form does not authorize the ability to trade, withdraw or perform other transactions. If you would like to grant this additional access, please submit a Power of Attorney. Your financial advisor can provide you with more information on how to do this and provide you with a Merrill form Power of Attorney, if necessary.

Next Steps

To grant online viewing access to an interested party with assistance from the Branch Office (using this form):

1. Have all account holders sign and return the enclosed Online Account Access Authorization Form.
2. Once we receive the completed form, we will grant online viewing access in 3–5 business days.

PLEASE NOTE: You can change or cancel the authorized user's access at any time by calling 877.653.4732.

To grant immediate access to an interested party through your MyMerrill login (without using this form):

1. Log in to MyMerrill.
2. Hover over the *Hi, Greeting Menu*.
3. Click **Account Access**. A new page will display.
4. Click **Get started**.
5. Review the Terms and Conditions and click **I agree** to accept.
6. Enter the Access Requester (interested party) information.
7. Select accounts to share.
8. Select an access question for the Access Requester to answer during enrollment.
9. Review setup information and confirm.
10. The Access Requester will then receive an email invitation to view your accounts.

PLEASE NOTE: You can change or cancel the authorized user's access at any time by revoking their access through the **Account Access** option.

Online Account Authorization Form

Please sign and return this form.

Name of Third Party to whom access is to be granted

Third Party email address (needed to grant access)

Relationship to Third Party

Account number 1

Account number 2

Account number 3

Account number 4

By signing below, I represent, warrant and attest that I, and all other account holders, am executing this document as an authorized signatory for the account(s) listed on this form and authorize to view the account(s) above online with read-only permissions. I/We understand that all account holders must sign.

I/We understand and agree that Merrill Lynch, Pierce, Fenner & Smith Incorporated is not responsible for any misuse of my/our account information and may, at any time, stop providing this service.

Instruction: All account holders must sign and date.

Print name of account holder: _____

Signature of account holder: _____

Required

Date: _____ / _____ / _____ *All account holders must sign and date.*

Required

Print name of account holder: _____

Signature of account holder: _____

Required if there is second account holder

Date: _____ / _____ / _____ *All account holders must sign and date.*

Required if there is second account holder

Print name of account holder: _____

Signature of account holder: _____

Required if there is third account holder

Date: _____ / _____ / _____ *All account holders must sign and date.*

Required if there is third account holder