

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 access account information by signing the enclosed form you will authorize them to view account information, request updates to account settings, such as E-delivery and share information with third parties either by downloading account information or by granting online viewing capabilities to a third party. In most cases, changes made to your account will generate a letter to you informing you of the change. Please be aware that the authorized requestor will have access to downloading information and capturing screen print which could result in your personal information being compromised. Additionally, the individual will set-up a login id and password. It is important that the authorized requestor safeguard this information. Merrill will not be responsible for any breach of security caused by failure of the authorized individual to properly secure this information. To protect against fraud, we advise you not to share your account log-in credentials with anyone. Alternatively, when you have authorized another individual or entity to act on your behalf, for example, if you have given them your account log-in credentials, you understand and acknowledge that the individual or entity has the ability to consent on your behalf for the sharing of account information to third parties, including data aggregation companies, who will use that data subject to their own terms and conditions.

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 your financial advisor.

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.

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Please sign and return this form.

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

ACCOUNT(S) ONLINE ACCESS REQUESTOR NAME

to view the account(s) below online with read only permissions. I/We understand that all account holders must sign

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ACCOUNT NUMBER

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ACCOUNT NUMBER

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ACCOUNT NUMBER

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ACCOUNT NUMBER

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. When you agree to authorize account access to the requestor, that means this person can give third parties, including data aggregators, with their own terms and conditions access to your account info.

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 are additional account holders

DATE _____ *All account holders must sign and date.*

Required if there are additional account holders

PRINT NAME OF ACCOUNT HOLDER: _____

SIGNATURE OF ACCOUNT HOLDER: _____

Required if there are additional account holders

DATE _____ *All account holders must sign and date.*

Required if there are additional account holders

Return form to: Merrill Document Processing, PO Box 31009, Tampa FL 33631-3009