

Client Digital Capabilities: Step-By-Step Instructions

My Financial Picture®

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Enroll in My Financial Picture®:

1. Log onto MyMerrill at <http://www.mymerrill.com>
2. Hover over “Portfolio & Accounts” from the top navigation bar
3. Click on “View all of your external accounts in one place” under the My Financial Picture heading
4. Click on “Enroll Now”
5. Review and accept the Terms & Conditions and indicate if you would like to grant your Advisor the ability to view your external account data – if so, click on “Yes” and then “Accept”
 - Note: You can add or remove shared accounts at any time by selecting “Manage > Sharing” under My Financial Picture
6. Click on “Add Accounts” to add outside institutions
7. Type in the name of your institution or select from the displayed list
8. After selecting the institution to add, enter your username, password, and any other information requested to validate your login access to your external accounts and click “Submit”
 - Note: Repeat steps 7 & 8 to add more accounts until all of your desired external accounts have been added

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