

Client Digital Capabilities: Step-By-Step Instructions

Digital Signature Suite: Digital Collaboration

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How to use Digital Collaboration with e-Signature on MyMerrill.com® to electronically sign forms with real-time help:

1. You will receive an e-mail to your personal e-mail account indicating that you have a new message waiting for you in your Secure Inbox
2. Log into MyMerrill
3. Click on the envelope icon in the top right corner to access the Secure Inbox to view the message and invitation to join the online session, along with contact information
 - Note: If it is within 15 minutes before or after the virtual meeting, you will receive a pop up to join once you log into MyMerrill
4. Review each of the required disclosures and accept any terms and conditions
5. Click on “Begin” to join the session
6. Once in the session, each party will have their own unique color for their cursor and the ability to complete or edit the form in real-time, simultaneously
7. Once the form is completed, the branch office will lock in the information entered so you can electronically sign the form
8. Once all parties have signed, click “Confirm & Continue”

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