

Client Digital Capabilities: Step-By-Step Instructions

MyMerrill Alert Settings (Desktop)

Turn on/off alert settings in MyMerrill (Desktop):

- 1. Log onto MyMerrill at <u>http://www.mymerrill.com</u>
- 2. Navigate to the top-right corner of the page and click on the envelope icon to access the Alerts page. View a timeline of all triggered alerts under the "Triggered Alerts" tab
- 3. To set/update alerts,, choose between the following alert types:
 - Investment Alerts: Input a ticker symbol and click "Set New Alert". Select the type of alert you wish to receive (price, earnings, ratings, etc.) and check the box next to the specific alert. Click "Submit" at the bottom when finished
 - Account Alerts: Choose which account you wish to set an alert for from the drop-down and click "Set New Alert". Choose the type of alert you wish to receive and check the box next to the specific alert. Click "Submit" at the bottom when finished
 - Security Alerts: Set a password reminder alert and/or choose whether or not to be notified if your User ID is entered on a new computer or mobile device
 - Market Alerts: Choose from alerts that help you stay on top of market activity. Check the box next to the specific alert you wish to receive and click "Save" at the bottom
- 4. To view/change the e-mail that should receive alerts, what types of alerts should be sent, when they should be sent, and how they should appear, click on the "Alert Delivery Options" Tab

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