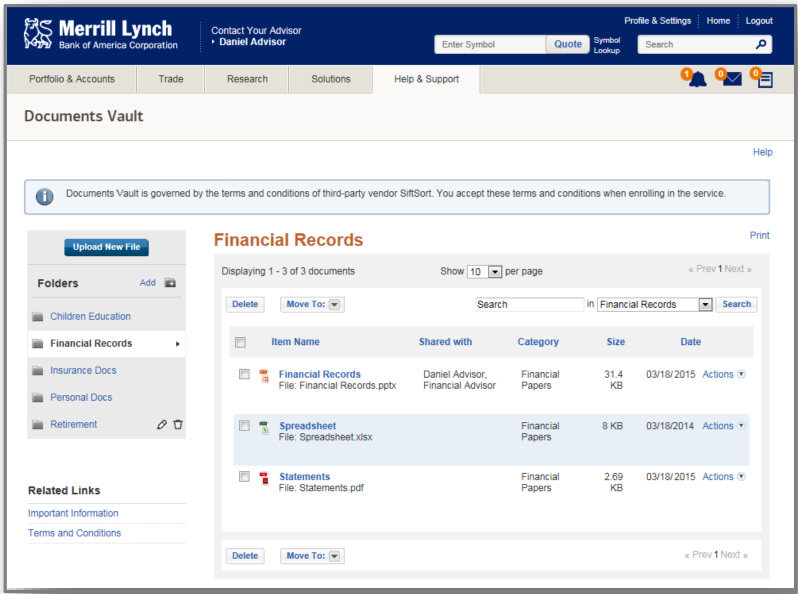
Documents Vault

Quick Guide

Documents Vault on MyMerrill.com® provides you with a convenient place to easily upload and store personal documents in a secure repository. These documents can be shared with your advisor allowing them to gather comprehensive, detailed financial information, which is critical in developing a successful goals-based investment strategy.

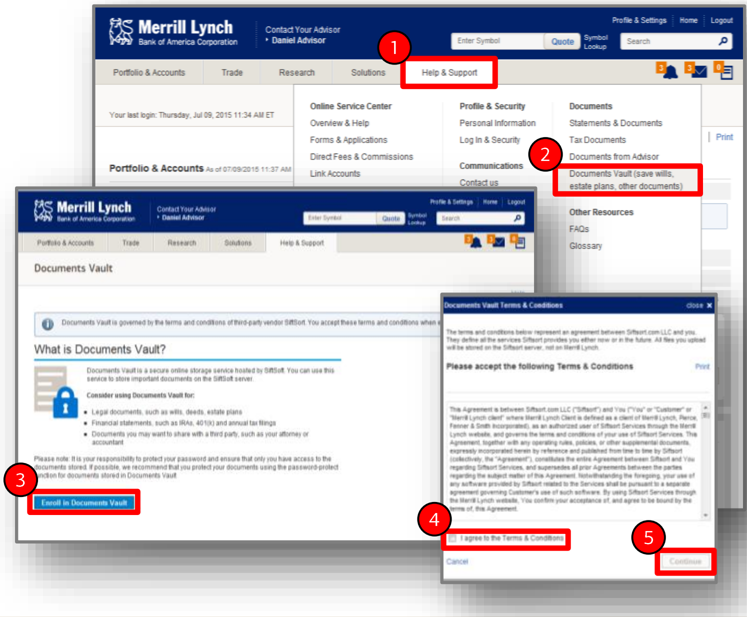
- With Documents Vault you have the ability to upload and store personal documents *(e.g., passport, drivers license, wills, deeds, insurance documents and financial documents)* in one convenient and secure location. All common file types are able to be uploaded and saved *(Word, Excel, PDF, PowerPoint and more).*
- You even have the option to share certain files with your advisor, eliminating the need to mail or fax documents.
- Certain document types cannot be shared. A message will notify you that the document selected may be uploaded but is not eligible to shared



Enroll in Documents Vault

Enrollment is easy. Just follow these simple steps to get started.

1. Go to MyMerrill.com and click on **Help & Support**.
2. Click on **Documents Vault** (save wills, estate plans, other documents).
3. Click on **Enroll Now.**
4. Check the box **I agree to the Terms & Conditions.**
5. Click **Continue** to complete the enrollment process.



For more information

To get started, visit MyMerrill.com and log in using your User ID and password. For assistance with Documents Vault please call 1.800.MERRILL (637.7455) or contact your financial advisor.