THE POWER TO
put plans into action
What would you like the power to do?

Every decision you make today is meaningful to building the life you want for you and your family. No matter what your priorities are, your Merrill Lynch Wealth Management Advisor combines actionable planning and objective advice to help you turn your ambitions into action.
What matters to you matters to us

We begin with a process of discovery that helps you define your priorities and goals. This process can be as eye-opening for you as it is for us.

One-on-one conversations help us get to know who you are and what you and your family want for your lives. Your dedicated advisor becomes familiar with your financial situation and what matters most to you. This allows you to have a personalized investment strategy designed specifically for you and what you want to achieve. And if you experience change or face the unexpected, your advisor can help you decide what to do or not do based on an understanding of your life.
Straightforward advice

Understanding more about your goals and what you want to achieve helps us provide objective advice for what to do next. We get to know you and your family. We look at the timelines you have in mind, along with your risk tolerance and investment objectives when creating a comprehensive financial strategy customized for you.

With our market and investment insights, we can provide guidance across a full range of investments. To build your strategy, we can draw from BofA Merrill Lynch Global Research and the expertise of our Chief Investment Office.

You’ll receive updates on how your investments are performing and what to do about them. You’ll also get clear, transparent pricing information from the start. When you work with an advisor, pricing is customized for you based on your relationship. You’ll understand exactly how much you’re paying and what you’re paying for so you’re not left with questions.
Advice for whatever comes next

Changes in life can require changes to your investment strategy. Whether it’s a small or significant event, we don’t assume what was right for you at one point is right the next. We evaluate market events through the lens of your goals and monitor your progress, helping you adjust your strategy based on new information. At the same time, we make sure you understand the pros and cons of every decision.
Integrated approach to banking and wealth management

With our full range of solutions, you can borrow and bank through Bank of America and invest through Merrill. Seeing your Bank of America banking and Merrill investing together can provide a holistic perspective that allows your advisor to craft more comprehensive wealth management strategies. At the same time, you can leverage innovative digital and mobile capabilities to stay connected to your investments and do everyday banking more easily. Investing and banking are connected, so you can view, manage, and securely transfer funds between your accounts with just one login.

As a client, you may be able to qualify for the best banking rewards available from Bank of America. Enjoy real benefits and rewards on your combined Merrill investment and Bank of America bank account balances—like credit card rewards and fee waivers. Traveling with a Bank of America debit card saves you international transaction fees or ATM fees. For big purchases like auto and home, you can enjoy rate reductions and relationship discounts for being a Wealth Management client.

We can help ensure you have the ability to address your needs holistically rather than through a single portfolio or product.