THE POWER TO
put plans into action
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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 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 track 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.
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With our full range of solutions, you can borrow and bank through Bank of America and invest through Merrill.

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Whether defining goals, addressing change or knowing how to move forward, your Merrill Lynch Wealth Management Advisor can help you take the next step now for where you want to be.

Speak with a Merrill Lynch Wealth Management Advisor today