

Audio Script

[Music in background throughout]

[Merrill logo on screen throughout]

[Speaker sitting at a desk with laptop open]

On screen copy:

How can I make an impact with my investing?

Disclosure:

Please see important information at the end of the video. Screenshots are for illustration only.

What if you could make investments that have the potential to provide a financial return while also focusing on companies committed to making the world a little bit better along the way?

It's possible, through something called Sustainable and Impact Investing. Now I say "possible" because let's face it, all investing comes with risk.

But with that in mind, you can make investments with the potential to generate a measurable social and environmental impact while also gaining value over time... and Merrill Edge Self-Directed has ways to help you find them.

I'll show you where to start looking on my screen, so you can do it yourself.

Once you log in to your account, you're going to be looking for information on ESG investments -- that stands for environmental, social and governance.

So, you can choose the kind of impact that's important to you, and invest in something that might help build the future you want to see - like a world where companies treat their workers and customers fairly and help keep our environment healthy.

On screen:

Merrill Edge® Self-Directed Login screen

But whatever your priorities are,

On screen:

Merrill Investment Dynamic Insights page

you can find your inspiration here, under “Idea Builder.”

On screen:

Merrill Idea Builder main page

It’s an uncluttered, intuitive way to find investing themes that might interest you.

On screen:

Transforming World page in Merrill Idea Builder

There are pre-screened lists of environmental leaders, and you can even search topics you’re interested in, like “water” to see choices that line up with what you’re looking for.

On screen:

Merrill Idea Builder search bar: water

Merrill Idea Builder search results for water

And if you find a stock or fund that aligns with your priorities, it only takes a few clicks to dig deeper. Whether you’re looking at a particular stock

On screen:

DRNS Stock Story Intro page for fictional stock

or a fund like this one,

On screen:

Showing where to find the ESG score for a stock in Stock Story

you can see an overall ESG score

On screen:

Showing an example of an MSCI ESG overall portfolio ESG score

or read a full ratings report from MSCI, who provide investors all over the globe with insights to better understand the potential impact of their investments.

On screen:

Showing an example of an MSCI ESG fund ratings report

Another feature within the fund’s story is here.

On screen:

Showing an ESG score chart for holdings screen

You can see each fund's top holdings and then take a closer look at those companies to see how they rate.

On screen:

ESG score chart for holdings screen with fictional company's popup

With access to tools like these, you don't have to be a research expert to find and validate how the stocks or funds align with the impact you'd like to make.

On screen:

ESG Investor Snapshot page for fictional company

Merrill even has tools to help you review your current portfolio through a social and environmental lens. They help you become aware of what you own, and where opportunities may exist.

So, when you visit your portfolio's dynamic insights page,

On screen:

Merrill Dynamic Insights Page

just expand your Impact Investing window

On screen:

Impact Investing window on Dynamic Insights page

to see what your portfolio's overall ESG score is.

On screen:

Overall

6.7

out of 10

You can also click over to your portfolio story to find the ESG details for your individual holdings too.

On screen:

Portfolio Story for Retirement Account page

As always, additional help is just a click or call away. And if you ever decide that you'd like a bit more advice and guidance, Merrill can also connect you with an advisor to talk about other sustainable impact investing choices.

On screen:

Call 24/7
888.637.3343

So that's it. If you're interested in trying to do some good for the world while you invest, now you know where to find ideas that can put your values into action.

Thanks for watching, and for choosing Merrill.

On screen copy:

What would you like the power to do?®

On screen:

Bank of America® logo
Merrill logo

Disclosure:

Important Information

Investing involves risk. There is always the potential of losing money when you invest in securities.

Institutional Investor magazine announced BofA Global Research as one of the Top Global Research Firms in 2022 based on surveys held throughout the year. The magazine creates rankings of the top research analysts in a wide variety of specializations, drawn from the choices of portfolio managers and other investment professionals at more than 1,000 firms. The 2022 Global Research Leaders ranking lists sell-side research providers by the combined total number of positions earned across *Institutional Investor's* 2022 research team surveys. Results of each survey are published separately throughout the year, beginning in March 2022 with the Japan Research Team and concluding in January 2023 with the China Research Team. Rankings for each poll are determined strictly by using numerical scores. *Institutional Investor* magazine takes the number of votes awarded to each firm in a sector and weight it in relation to the size of the institution responding and rating it awarded. Firms are designated runners-up when their scores fall within 35 percent of the third-place scores. BofA Global Research is research produced by BofA Securities, Inc ("BofAS") and/or one or more of its affiliates. BofAS is a registered broker-dealer, Member SIPC, and wholly owned subsidiary of Bank of America Corporation. Learn more about this award by visiting <https://www.institutionalinvestor.com/article/b8x00pb8rf5fbf/These-Are-the-World-s-Best-Research-Firms>. Rankings and recognition from *Institutional Investor* are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement.

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Sustainable and Impact investing and/or Environmental, Social and Governance (ESG) managers may take into consideration factors beyond traditional financial information to select securities, which could result in relative investment performance deviating from other strategies or broad market benchmarks, depending on whether such sectors or investments are in or out of favor in the market. Further, ESG strategies may rely on certain values based criteria to eliminate exposures found in similar strategies or broad market benchmarks, which could also result in relative investment performance deviating.

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