



WHY US

You probably expect your advisor to provide guidance developing your financial plan and investment approach. But with FIBOVIX, your advisor is so much more – listening to your needs and understanding what matters most to you and your family. You and your advisor will work together one on one to help create a strategy that's uniquely yours.

Why FIBOVIX

Everything we do starts with our purpose. Re-imagining the power of investing. Connecting people for a better world. This is our purpose. This is Fibovix



Your needs

Your goals, concerns and attitude about investing are the foundation of your plan.



Your advisor

From the first conversation on, your advisor will provide personalized advice, committed to helping you reach your goals.

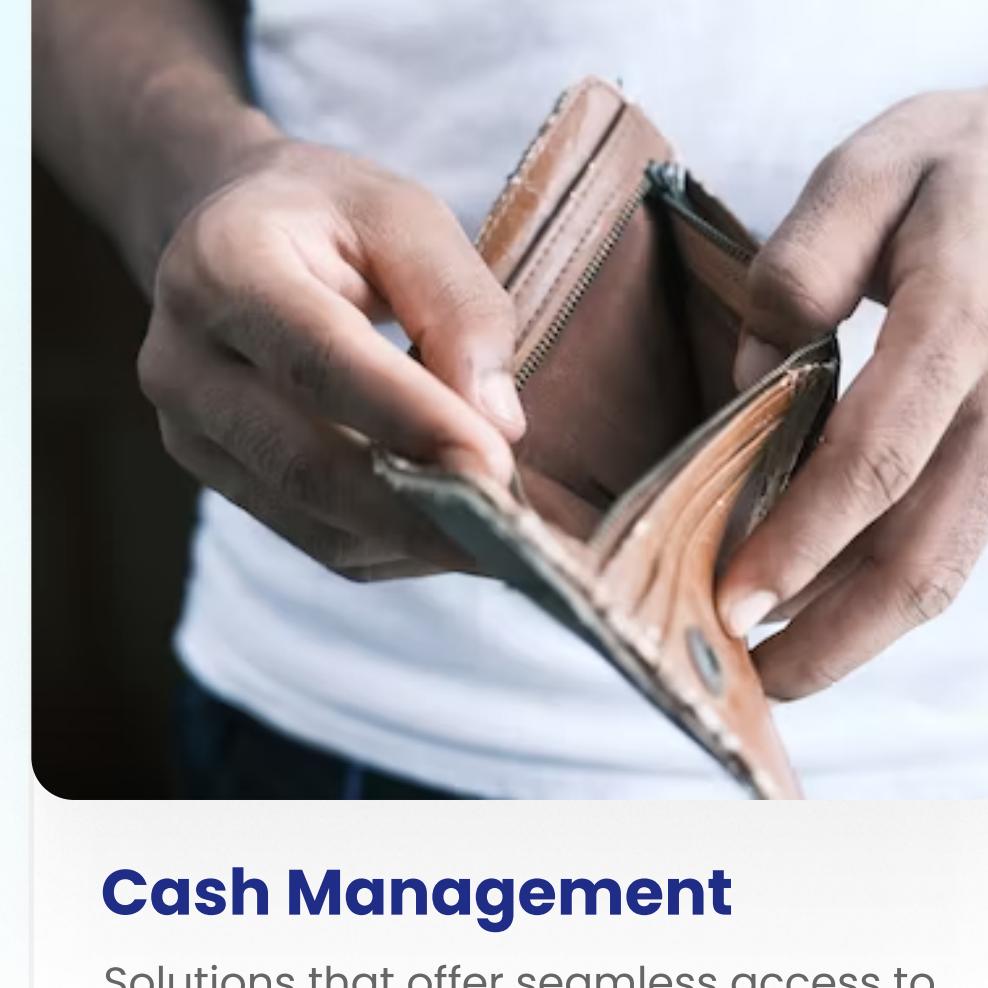


Your personalized strategy

As part of your overall investing plan, your advisor can offer tax minimization strategies.

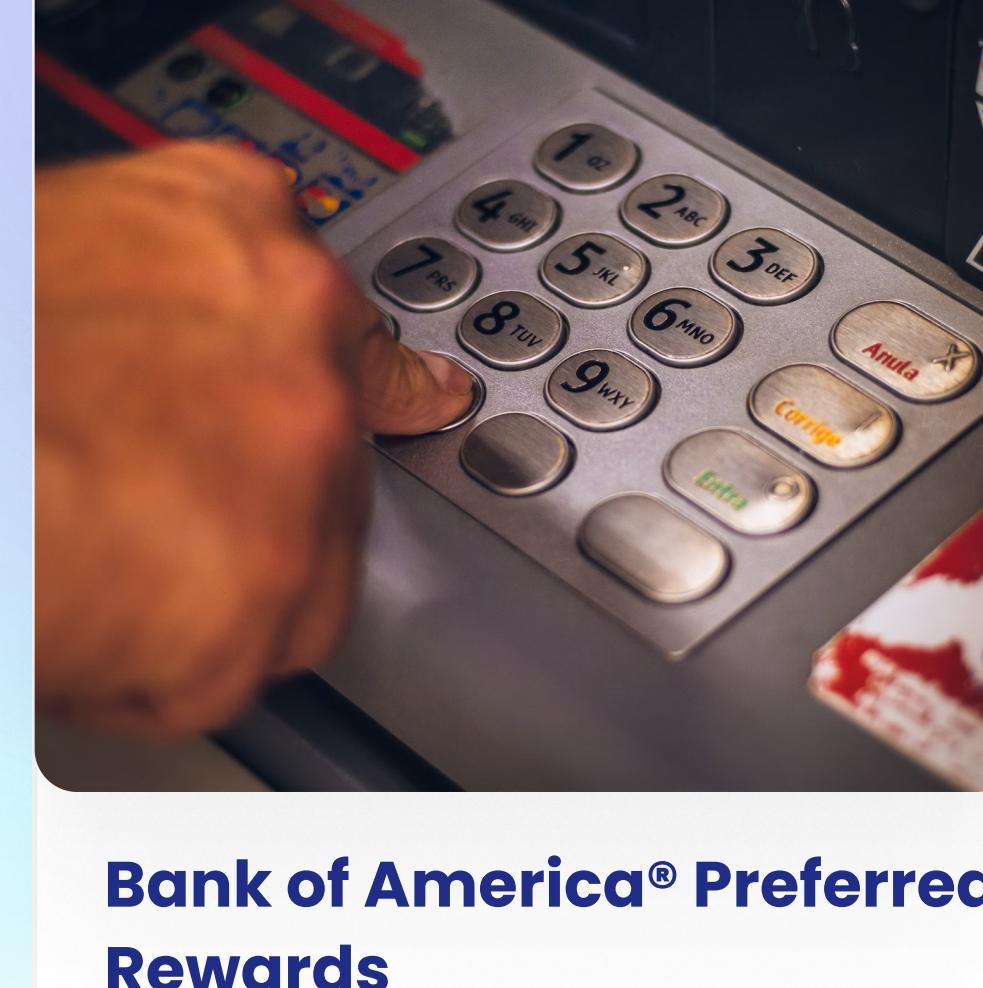
Our Solutions

Uncovering opportunities. Meeting challenges. Taking that next step forward. Whatever your goals, Merrill and Bank of America offer a wide range of solutions to help you get there.

[Banking](#)
[Lending](#)
[Investments](#)
[Retirement & savings](#)
[Insurance](#)
[Wealth Planning](#)
[All items](#)


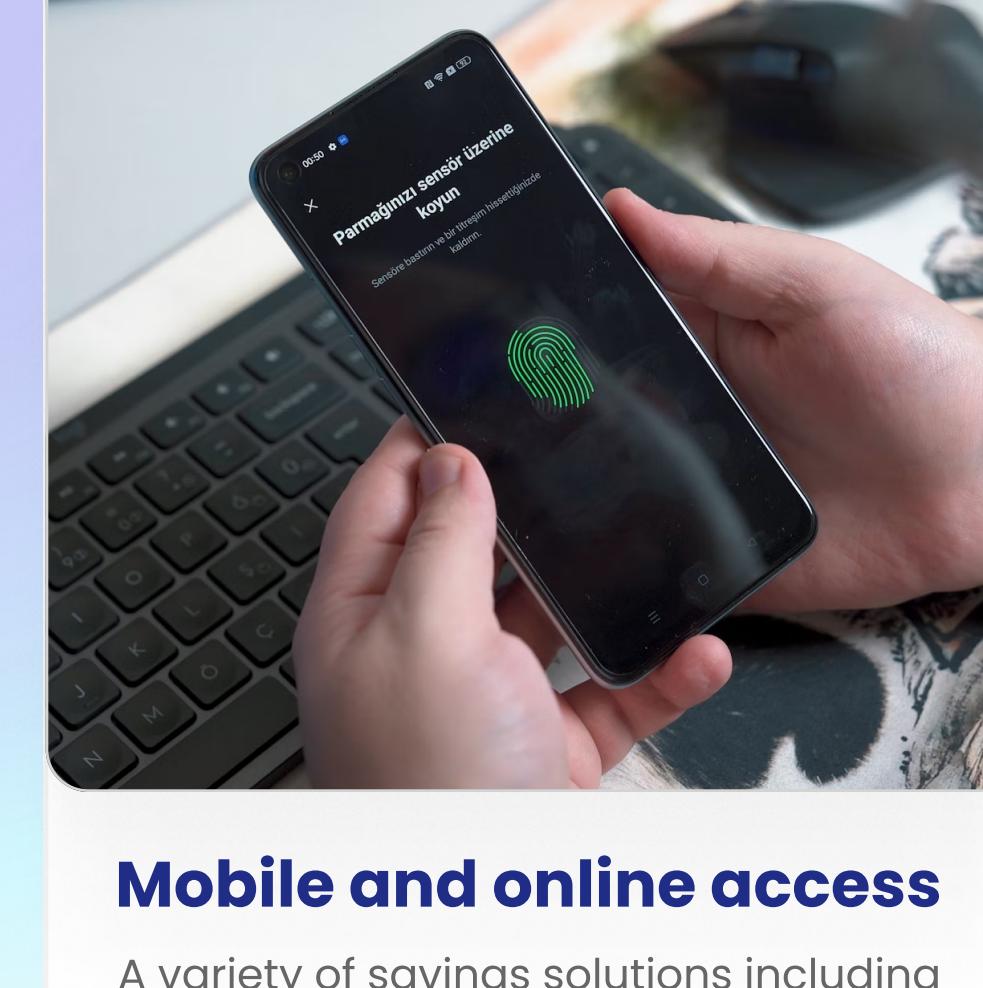
Checking

Accounts featuring tiered interest rates, relationship-based maintenance fee waivers and discounts on everyday Bank of America banking services.



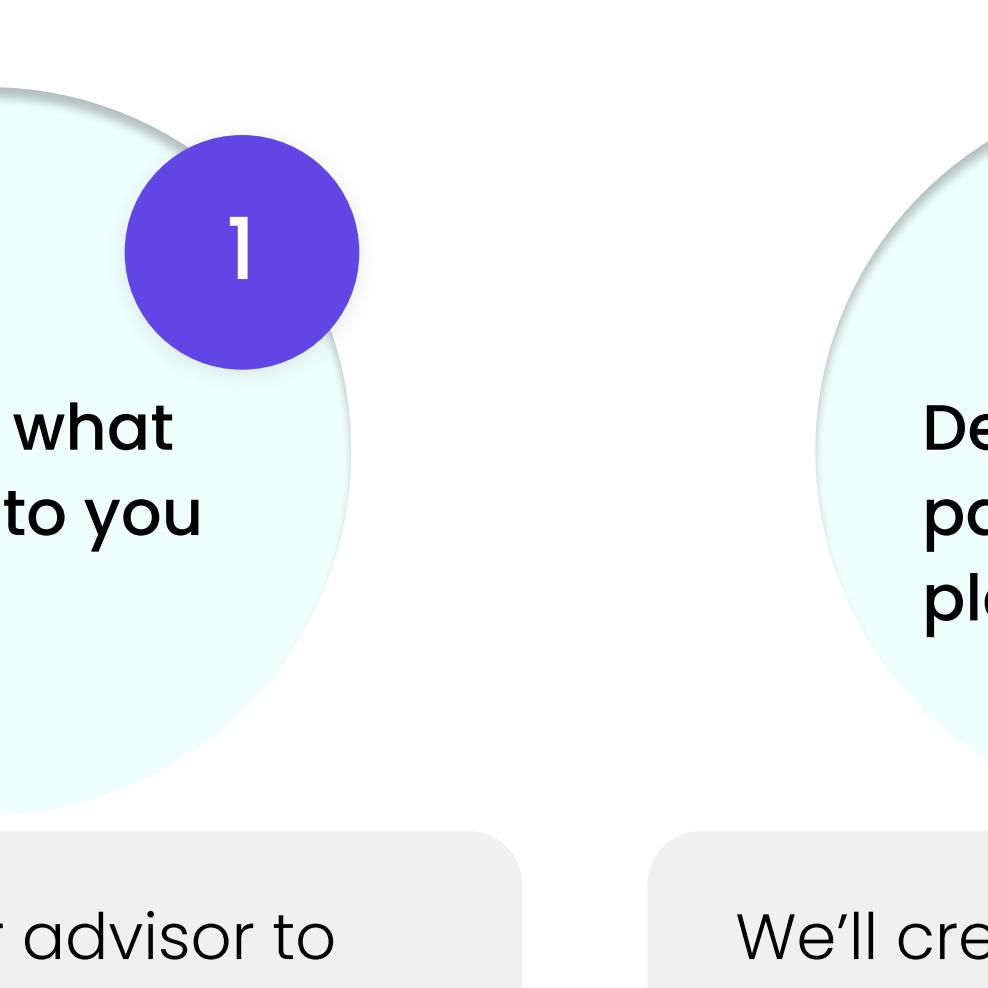
Savings

A variety of savings solutions including money market accounts and CDs to support your savings goals.



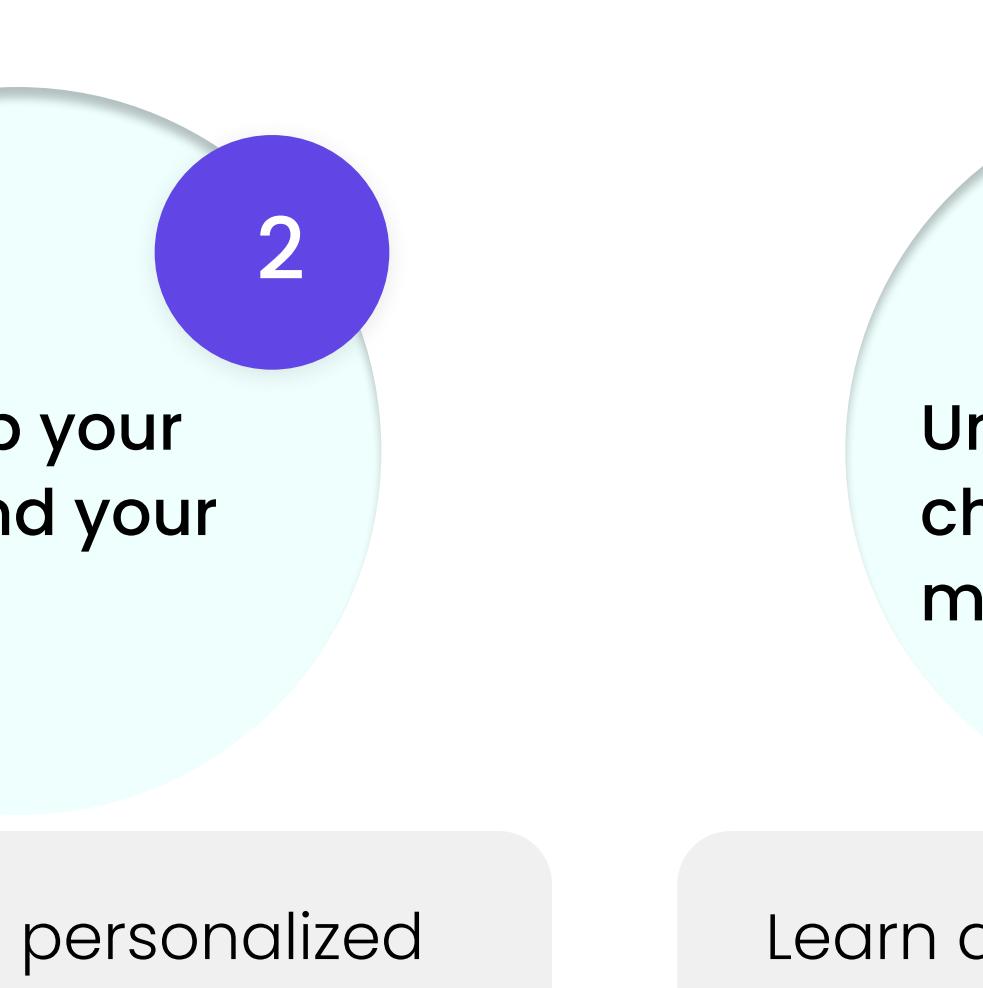
Credit cards

A suite of exceptional credit cards with enhanced benefits, travel rewards and cash back options.



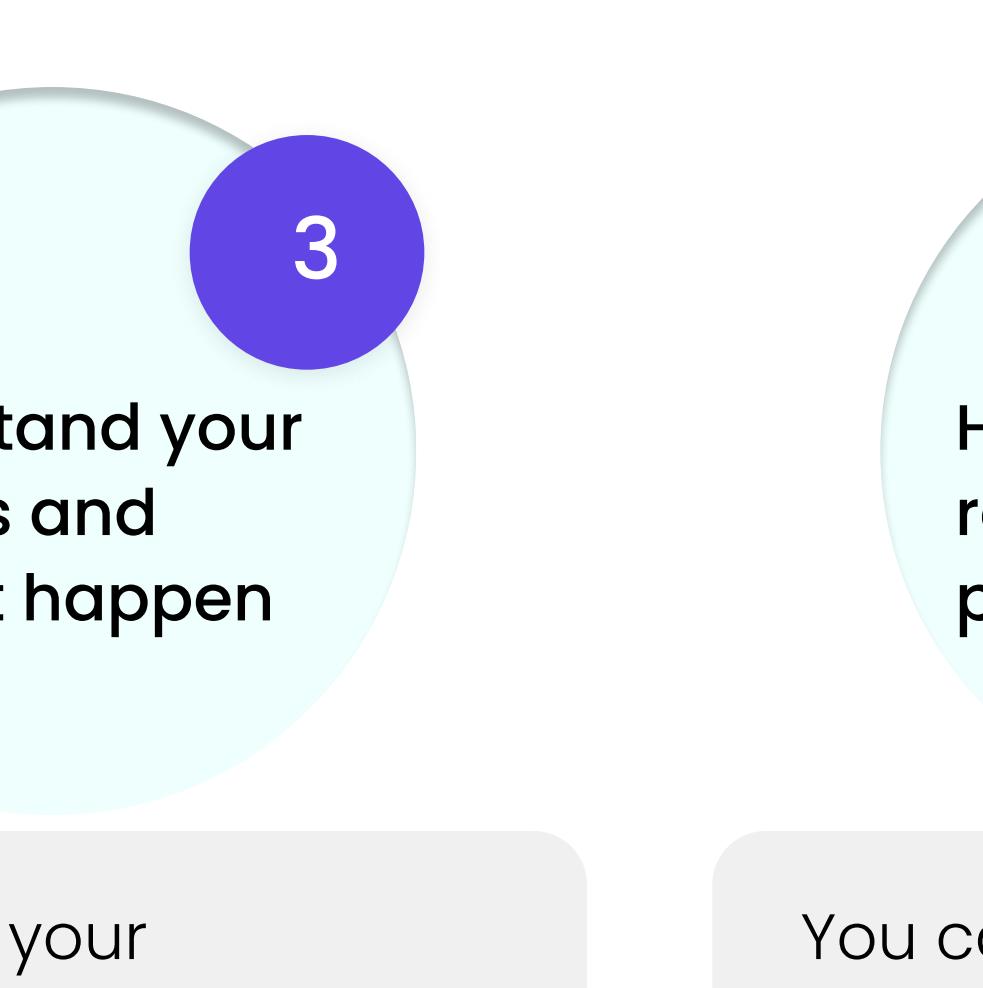
Cash Management

Solutions that offer seamless access to your cash and competitive yields. Convenience of cash management and investment services through your Merrill Cash Management Account® (CMA®).



Bank of America® Preferred Rewards

Our way of showing you our appreciation with premium benefits and rewards around the different ways you work with us.



Mobile and online access

A variety of savings solutions including money market accounts and CDs to support your savings goals.

Take Actions

1

Uncover what matters to you

Work with your advisor to understand what is important to you now and what you want in the future. If you don't have an advisor, we can help you find one.

2

Develop your path and your plan

We'll create a personalized plan that is all about you, with guidance that truly supports you.

3

Understand your choices and make it happen

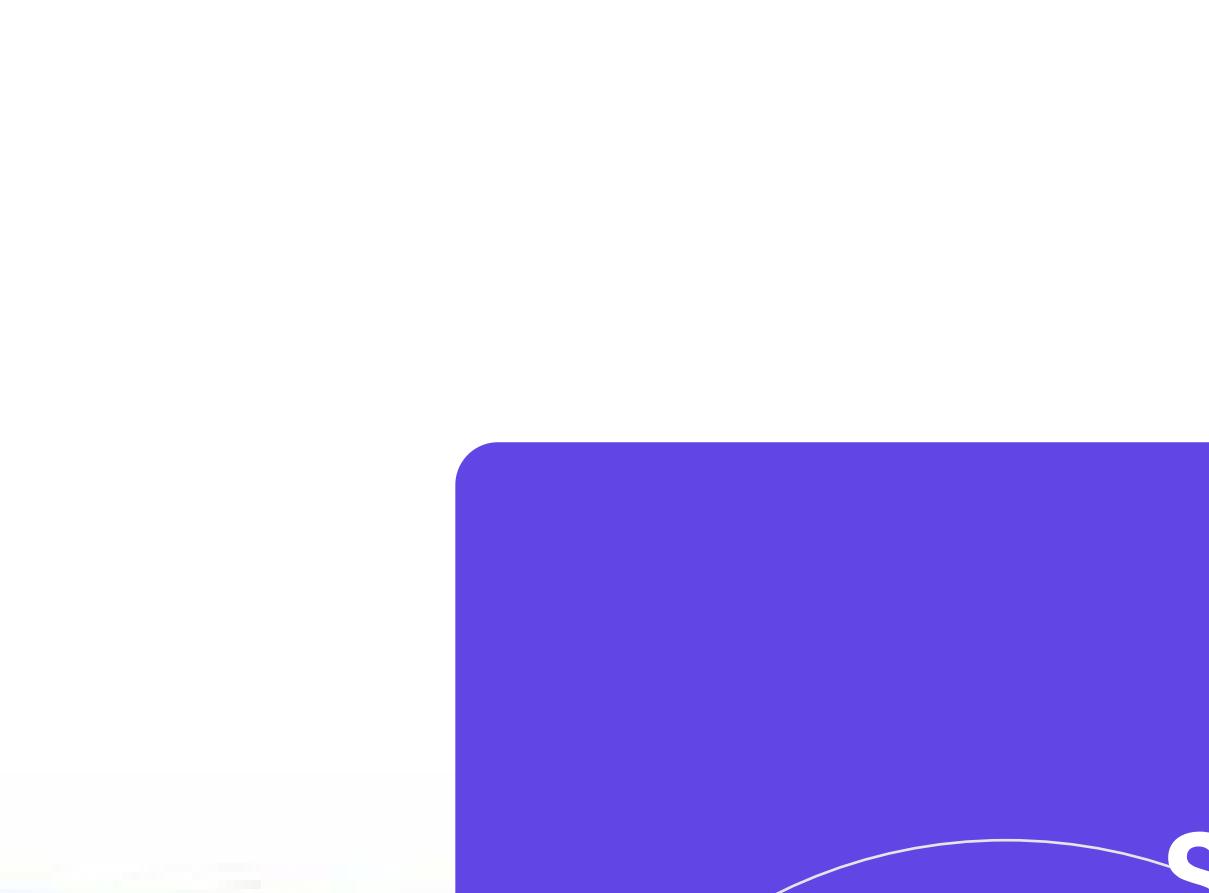
Learn about your investment relationship and program options, then work with your advisor to set your plan in motion, drawing from a range of potential Merrill investment and Bank of America banking solutions.

4

Helping you review, track your progress

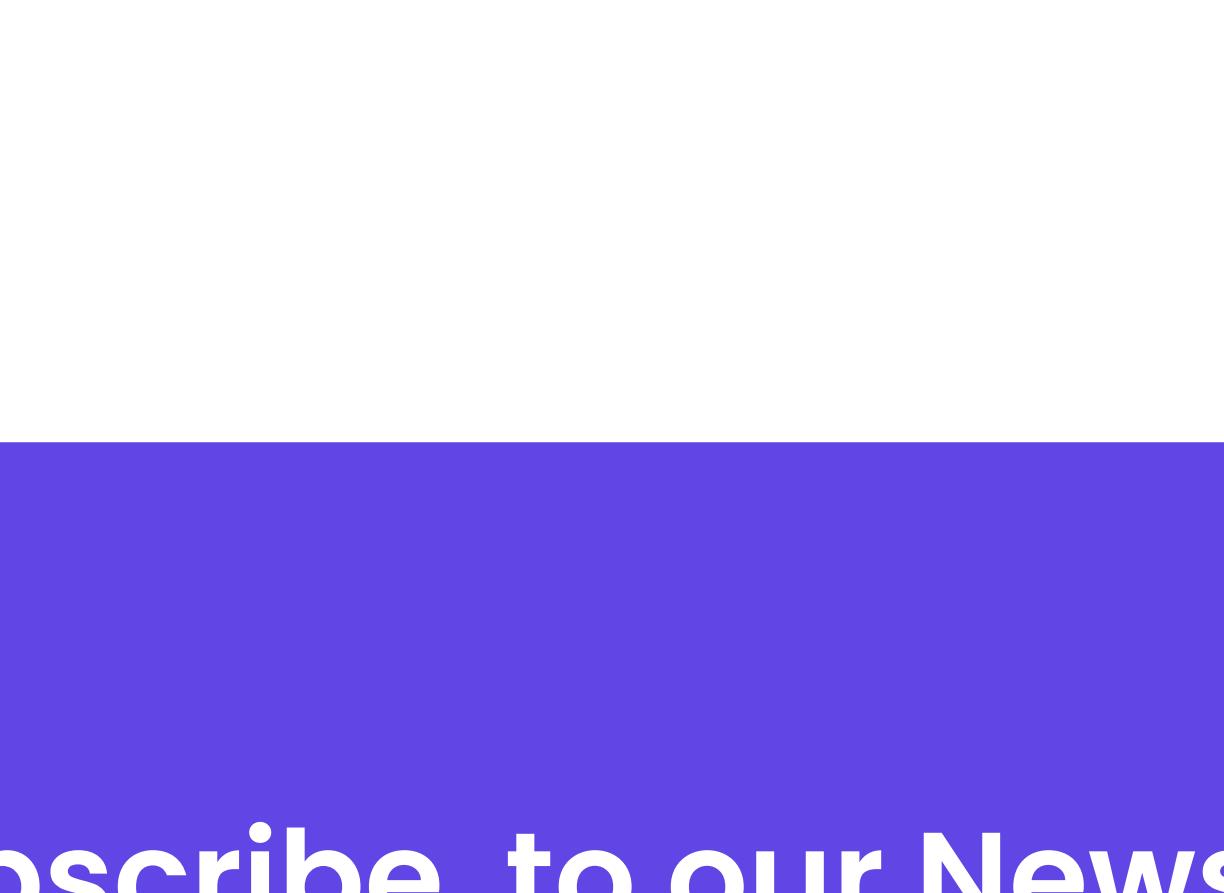
You can track your milestones and modify your plan based on the expected and unexpected things life brings.

Addition Solutions



Diversification of investment

Diversify your portfolio with a wider variety of solutions.



Investment consolidation

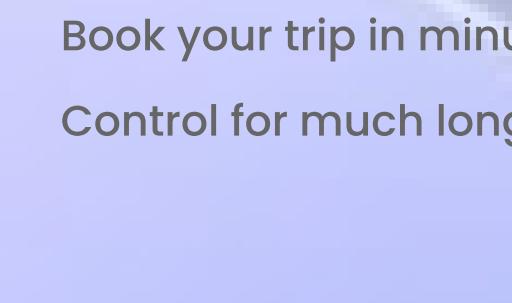
See your big picture by consolidating investment accounts.



Online account view

Bring your investing and banking together online.

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