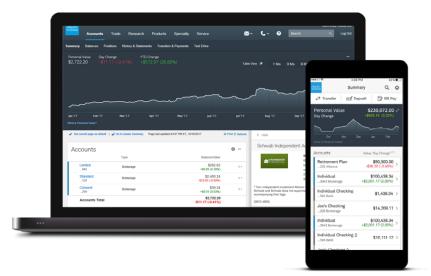
#### *charles* SCHWAB

### Easy, secure access

Signing up for Schwab Alliance gives you access to your account information virtually anytime, anywhere, while saving time and paperwork.

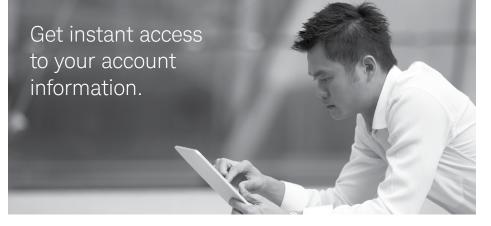
Designed for investors like you, our website and mobile app enable you to stay informed about your accounts while still relying on the one-on-one guidance provided by your independent advisor.



# Monitor your accounts easily and securely

- Get instant access to your account information online, or on-the-go with the Schwab mobile app.
- Stay informed on the status of requests and securely approve transactions.
- Keep your contact information up to date so you can be notified.
- Count on secure, paperless delivery of important documents, including account statements, trade confirmations, and tax reports.\*
- Conveniently deposit checks with a click of the camera on your phone or tablet.
- Grant View Only access to third parties, such as CPAs, attorneys, and family members.
- Enhance your account security by adding two-factor authentication.

Ask your advisor to initiate your online access to Schwab Alliance—it's free, fast, and easy.



\*You must be listed as the account owner to enroll in electronic delivery.

For illustrative purposes only.

### Set up account access one of two ways

Select an option and then follow steps 2-8 beginning on the next panel.

#### **OPTION 1**



You'll receive an email with a link to get started. If the link has expired, ask your advisor to resend.

Schwab Alliance Activation
Your investment advisor has requested that Schwab Advisor Services send you an email to activate your account on the Schwab Alliance website. Schwab Alliance is a web site designed for clients of investment advisors and will allow you fast, convenient, and secure access to your account information including access to your archive of statements and other documents.
To activate your accounts online, please click the link below or copy and paste into your browser:
www.schwab.com/sa_webactivate
For questions or assistance with the web activation process, please contact your advisor or the Schwab Alliance team at 800-515-2157.

CONTACT US

🛍 LOG IN

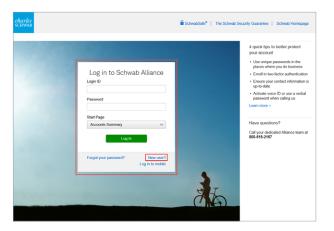
#### **OPTION 2**

MESSAGES

#### Initiate enrollment on your own

PRIVACY

Go to schwaballiance.com and click "New User?"



Note: Always use caution when logging in away from home. Visit Schwab Safe on the Schwab Alliance homepage for more tips on online security.

#### 2 Verify your personal information

You'll need to enter information such as your Social Security number and brokerage account number through our secure interface. Your account number is the eight-digit number at the top of your statement. If you own more than one account, you can enter any one of those account numbers.

<i>arles</i> нwлв	
	1. Personal Information 2. Venty 3. ID & Password 4. Acknowledgment
	New Schwab user? Create a Schwab login.
	Once we verify your identity, you will create a login ID and password. Oon thave an account yet? Open one online. If you need help call Schwab at 1-800-435-4000 if you are within the U.S. and outside the U.S. call +1-415-667-8400.
	Brokerage Account Number
	Date of Birth mm/dd/yyyy
	Phone Number
	Social Security Number or Gov1 Issued ID Number Ø
	Social Security number or Gov I issued to number ()
	Cancel Continue

#### Verify your identity

As an additional layer of security, Schwab will text an access code to your mobile phone or call you directly.

<i>charles</i> scнwлв	
	1. Personal Information 2. Vetity 3. ID & Password 4. Acknowledgment
	Verify your identity.
	For your protection, we need to verify your identity before proceeding. Please choose one of the authentication methods. If you need help call Schwab at 1-800-435-4000 if you are within the US and outside the US call +1-415-667-8400.
	Schwab will text your mobile phone with an access code
	If your mobile phone is accessible, we can send the access code via text message.
	<ul> <li>Schwab will call you with an access code</li> </ul>
	Cancel Continue

#### Enter the verification code

Type in the access code provided by Schwab.



#### 5 Create your login ID, password, and security question and answer

Create a login ID and password unique to this account. Choose a secret question and answer to make any future password resets easier. Answers must be at least five characters in length and can include spaces, but cannot contain symbols (e.g. !@#%). For your own security, do not share this information with anyone, including your advisor.

<i>charles</i> SCHWAB		
	1. Personal Information 2. Verify 3. ID & Password	4. Acknowledgment
	Choose your Login ID and password.	
	Password	
	At least 6 characters At least 1 number At least 1 letter	
	Confirm Password	
	Select V	
	Security Answer	
		Cancel Create Login

#### 6 Acknowledgment

You will receive confirmation that your login ID and password were created. Click on the "continue to your account" link to log in.

<i>charles</i> schwab				
	1. Personal Information	2. Verify	3. ID & Password	4. Acknowledgment
	You successfully created y	rour Login ID and password.		
	Your login ID and password are re	ady to continue to your account	t.	

#### Review and accept user agreements

Review the user agreements and click "Agree" for each to accept their terms.

1) Online User Agreements	2 Document Delivery	
lectronic Services Agreement (Agreement 1	of 2)	
he Electronic Services Agreement ("ESA") that follows coount. To meet information vendor requirements, we	is included in your account agreement. We deliver the account agreement to you separately when you open your abo need you to review and accept the ESA online.	^
gree," you will be consenting to electronic delivery of t incryption, Secure Sockets Layer capable browsers will ou may print the ESA before you click "I agree," and y	une part projektor information bai ar apposited will be or destructed centent and anxies, Viben you citic "1 when item item it ITM. Can care and entrin them for your records, forbain recommended the use of brains have 30 per landbed. To issue more about bouvoers and informed society, place citic on the last <u>centers social</u> to undord them is conjust optimum of your and appendent. If you do to them a partice, you call us for a free A. The ESA will always be available for your review under the "Agreements" link found at the bottom of many pages	
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#### Enroll in paperless delivery

8

Sign up for electronic delivery of key account documents. You can enroll all eligible accounts or select specific accounts for documents you wish to enroll.

1 Online User Agreements	2 Document Delivery	
Online Addendum to Electronic Services Agr	eement (Agreement 2 of 2)	
MPORTANT INFORMATION ABOUT YOUR ACCOUN	r	
he past. At that time, Schwab recorded your agreemen Exchange ("NYSE") and The NASDAQ Stock Market LL	the following agreements. If you are an existing Schwab co to these terms against each of your accounts, in order to core C (MASDAC) (collectively the "exchanges"), we are required ave access to real time stock quotations. Thank you for your	tinue to deliver market data provided by the New York Stock to have you re-affirm your consent to these agreements as
f you need immediate access to your account(s) to p	Nace a trade, or if you have questions not answered here,	please contact us at 800-435-4000.
	he appropriate response box. When you finish, please indicat smatically record your agreement into our files, as required by	
'ou may print these agreements for your files or you car ince you are logged in. We thank you again for your pat	also access these and other agreements at any time using the ence and cooperation.	ne "Agreements" link at the bottom of Schwab.com pages
Inline Addendum to Electronic Services Agreement		
our account agreement(s) and the "Electronic Services eccept and use of Information provided to Schwab by (1)	on," including real-time market data such as quotations, avai Agreement" to which you have previously agreed (collectively the NYSE, each Consolidated Tape Association participant,	the "Agreement"). This Addendum applies to your online
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Enhance your account security by adding two-factor authentication and device verification. Visit the Security Center on the <u>Schwab Alliance website</u> for more information. Contact a Schwab Alliance specialist at **1-800-515-2157** or ask your investment advisor if you have questions.

### Setting up mobile access



## Download the Schwab mobile app

Visit the app store for your mobile device and search for "Schwab mobile."





### 3 Check your mobile app settings

Navigate to "More" and select "Profile & Settings" and then "Login Settings." Scroll to the bottom and turn on "Allow Multitasking" to approve transactions electronically from your device.





Use the same Schwab Alliance credentials you use online.



# 4 Turn on push notifications (for iOS/Apple devices only)

Navigate to your device "Settings" and select "Notifications." Ensure that the Schwab app is in the list of included apps. You can choose to display alerts on "Lock Screen", "History" and "Banners." Alerts will notify you of money movement requests requiring your approval.



Sign up for online access today, or call a Schwab Alliance specialist at **1-800-515-2157** 

The Schwab Mobile Deposit service is subject to certain eligibility requirements, limitations, and other conditions. Enrollment is not guaranteed, and standard hold policies apply. Access to electronic services may be limited or unavailable during periods of peak demand, market volatility, systems

upgrade, maintenance, or for other reasons. Android is a trademark of Google, Inc.

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