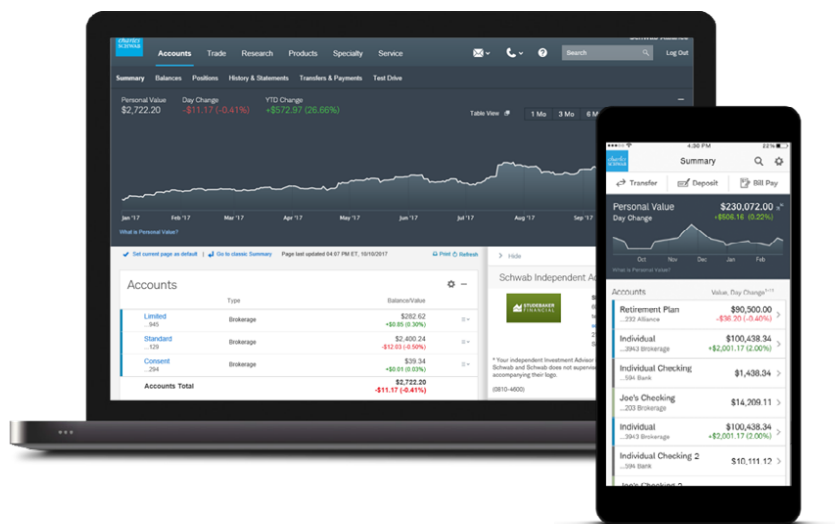


Signing up for Schwab Alliance gives you access to your account information virtually anytime, anywhere, while saving time and paperwork.

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.

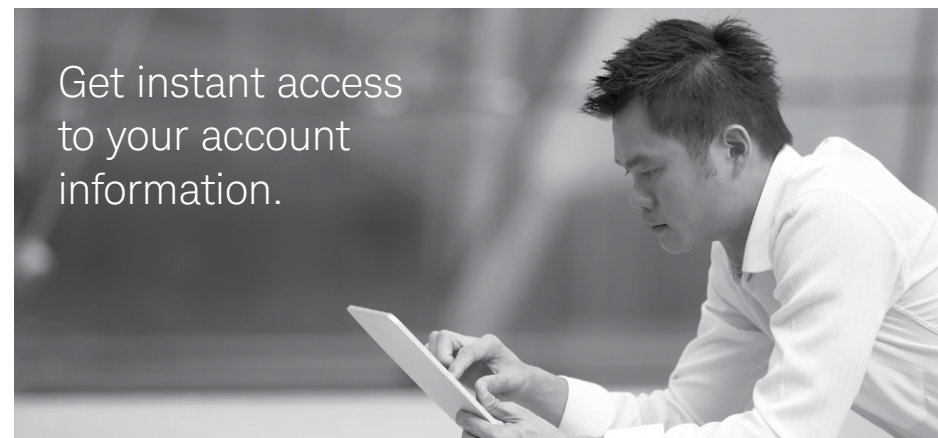


For illustrative purposes only.

## 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.



Get instant access to your account information.

\*You must be listed as the account owner to enroll in electronic delivery. You may also be eligible for lower electronic equity trade commissions if you enroll in electronic delivery.

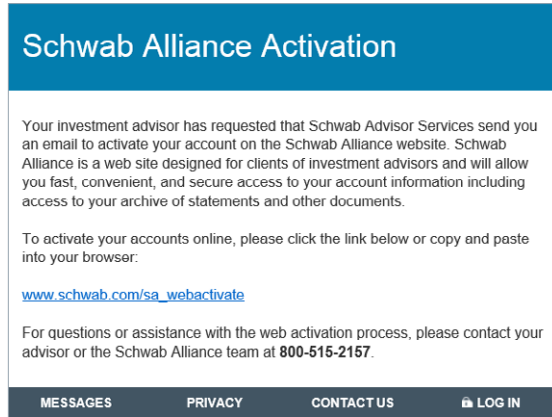
# Set up account access one of two ways

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

## OPTION 1

### 1 The easiest way: Ask your advisor to initiate your online enrollment

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](http://www.schwab.com/sa_webactivate)

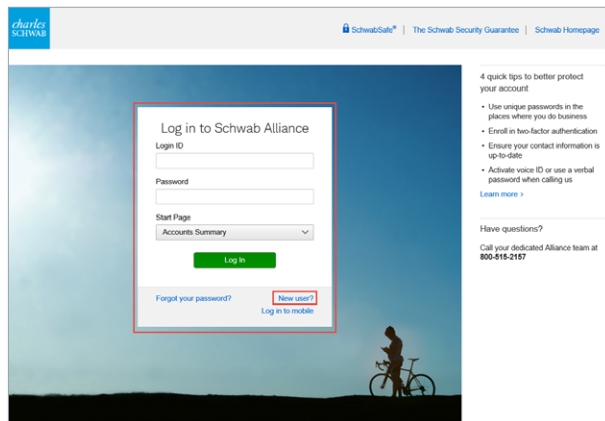
For questions or assistance with the web activation process, please contact your advisor or the Schwab Alliance team at **800-515-2157**.

MESSAGES PRIVACY CONTACT US LOG IN

## OPTION 2

### 1 Initiate enrollment on your own

Go to [schwaballiance.com](http://schwaballiance.com) and click “New User?”



Log in to Schwab Alliance

Login ID

Password

Start Page  
Accounts Summary

Log In

Forgot your password? [New user?](#) [Log in to mobile](#)

4 quick tips to better protect your account

- Use unique passwords in the places where you do business
- Enroll in two-factor authentication
- Ensure your contact information is up-to-date
- Activate voice ID or use a verbal password when calling us

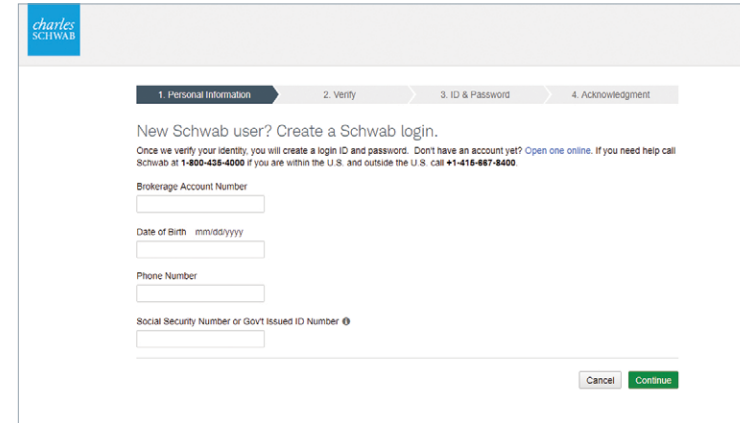
Learn more >

Have questions?  
Call your dedicated Alliance team at **800-515-2157**

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.



1. Personal Information 2. Verify 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. Don't have 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

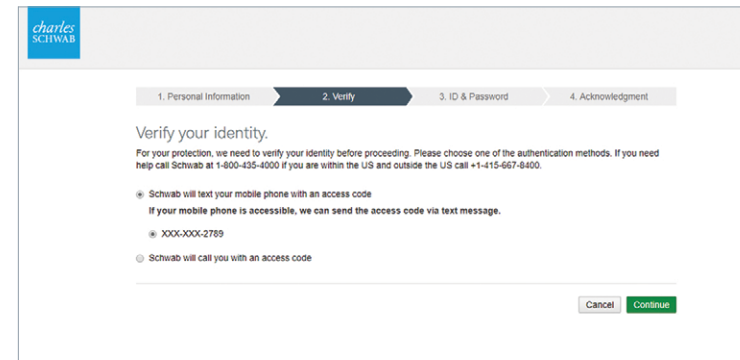
Phone Number

Social Security Number or Gov't Issued ID Number

Cancel Continue

### 3 Verify your identity

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



1. Personal Information 2. Verify 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.
  - XXX-XXX-2789
- Schwab will call you with an access code

Cancel Continue

## 4 Enter the verification code

Type in the access code provided by Schwab.

The screenshot shows the Schwab website's verification step. At the top, the Charles Schwab logo is visible. Below it, a progress bar indicates four steps: 1. Personal Information, 2. Verify (highlighted), 3. ID & Password, and 4. Acknowledgment. The main heading is "Enter the verification code." Below this, it says "Text in progress to: XXX-XXX-2789 (Please allow up to one minute to receive the text)". There is a text input field for the "Access Code" with a small "i" icon to its left. Below the input field, there are two lines of text: "I want to use a different phone number or method" and "I don't receive an access code and want to try this number again". At the bottom right, there are two buttons: "Cancel" and "Continue".

## 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.

The screenshot shows the Schwab website's account creation step. At the top, the Charles Schwab logo is visible. Below it, a progress bar indicates four steps: 1. Personal Information, 2. Verify, 3. ID & Password (highlighted), and 4. Acknowledgment. The main heading is "Choose your Login ID and password." Below this, there are several input fields: "Login ID At least 6 characters", "Password", "Confirm Password", "Security Question" (with a dropdown menu), and "Security Answer". Below the input fields, there are two buttons: "Cancel" and "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.

The screenshot shows the Schwab website's acknowledgment screen. At the top, the Charles Schwab logo is visible. Below it, a progress bar indicates four steps: 1. Personal Information, 2. Verify, 3. ID & Password, and 4. Acknowledgment (highlighted). Below the progress bar, there is a green checkmark icon and the text "You successfully created your Login ID and password." Below this, there is a link that says "Your login ID and password are ready to continue to your account."

## 7 Review and accept user agreements

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

The screenshot shows the Schwab website's Electronic Services Agreement (ESA) screen. At the top, the Schwab Alliance logo is visible. Below it, a progress bar indicates two steps: 1. Online User Agreements (highlighted) and 2. Document Delivery. The main heading is "Electronic Services Agreement (Agreement 1 of 2)". Below this, there is a large text area containing the terms of the agreement. At the bottom right, there are two buttons: "Exit" and "Agree".

## 8 Enroll in paperless delivery

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.

The screenshot shows the Schwab website's Online Addendum to Electronic Services Agreement (ESA) screen. At the top, the Schwab Alliance logo is visible. Below it, a progress bar indicates two steps: 1. Online User Agreements (highlighted) and 2. Document Delivery. The main heading is "Online Addendum to Electronic Services Agreement (Agreement 2 of 2)". Below this, there is a large text area containing the terms of the addendum. At the bottom right, there are two buttons: "Exit" and "Agree".

Enhance your account security by adding two-factor authentication and device verification. Visit the Security Center on the [Schwab Alliance website](#) 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

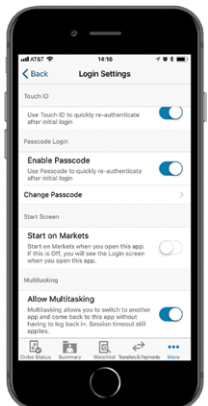
## 1 Download the Schwab mobile app

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.



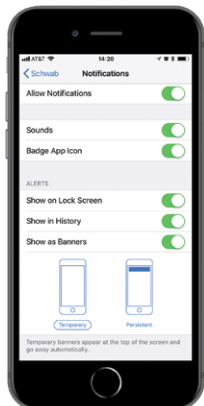
## 2 Log in to access your account

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. Apple and the Apple logo are trademarks of Apple Inc., registered in the U.S. and other countries. iTunes, App Store, iPhone, and iPad are trademarks of Apple Inc. Amazon, Kindle, Kindle Fire, and the AmazonKindle logo are trademarks of Amazon.com, Inc. or its affiliates. © 2018 Charles Schwab & Co., Inc. (Schwab). All rights reserved. Member SIPC. TWI (0718-8WNT) MKT70909FM-02 (07/18)