



## **How to view your Spouse's Accounts under your login on Schwab Alliance**

There are 2 ways to accomplish this.

### Option One:

1. Log into Schwab alliance: <https://client.schwab.com/Login>
2. Click on "Profile" in the upper right corner & choose "Account Access" from the drop down
3. Click the "Give Account Access" Button
4. Click "View Only"
5. Choose which accounts to give permission to
6. Enter the information & click "Continue"
7. Verify the information & click "Continue"
8. Review & Submit

***\*With Method one you have to do this for each account you want to grant access to.***

### Option Two:

Call our office and we can DocuSign a form to grant authorization for your spouse to view your accounts.