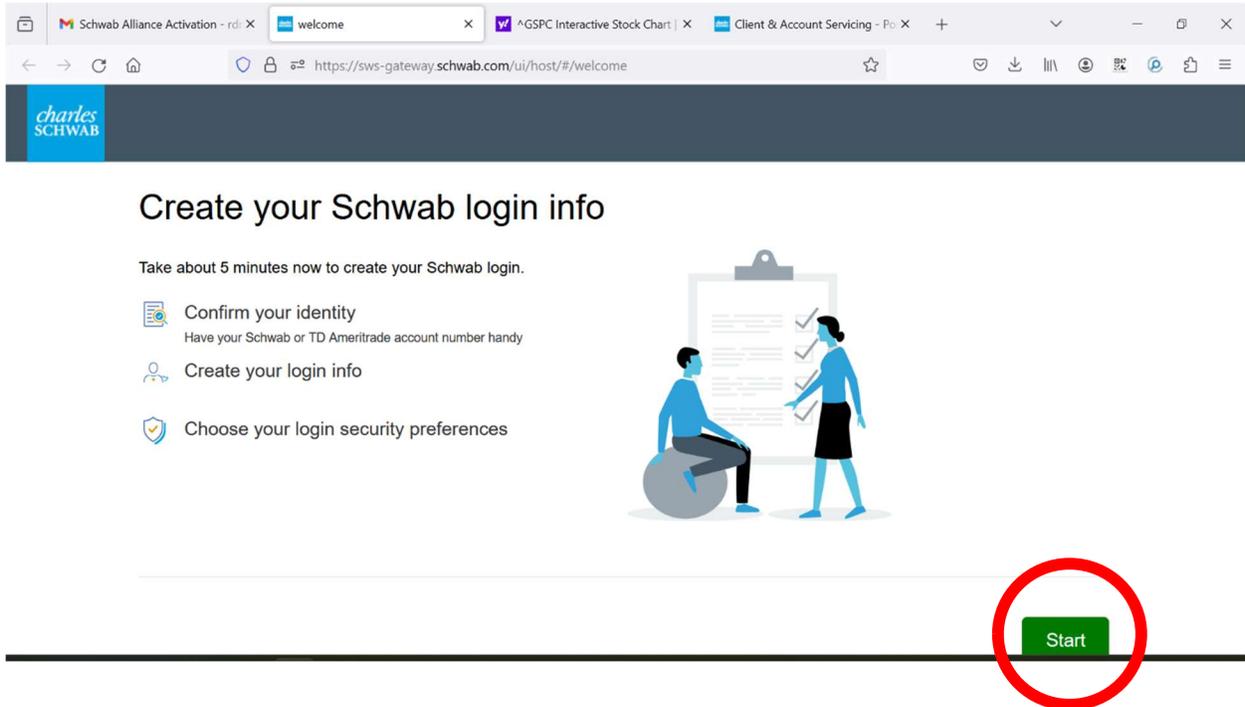


Schwab Alliance Set Up

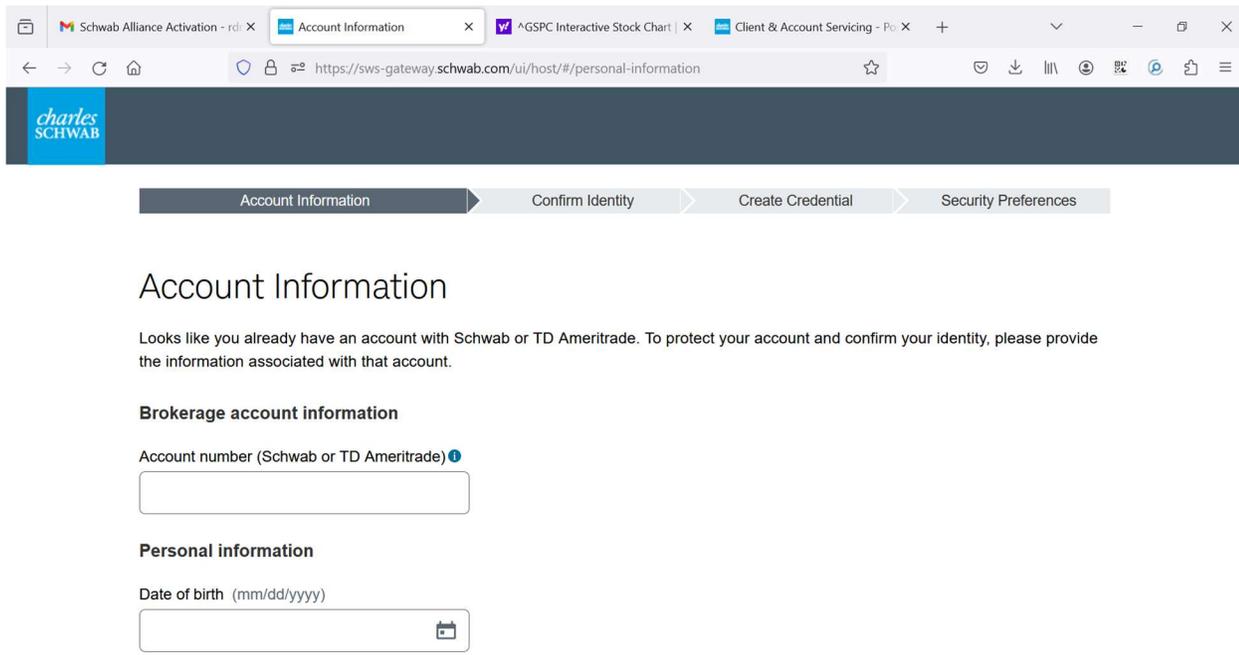
After you click the link in the activation email from Schwab-

Below is a picture of the first screen you should see. Click **START** on the bottom right.



Next, enter your Schwab account number and fill in your **personal information** and select **continue**.

(All highlighted areas below)



Schwab Alliance Activation - rdi x Account Information x ^GSPC Interactive Stock Chart x Client & Account Servicing - Po x +

https://sws-gateway.schwab.com/ui/host/#/personal-information

Personal information

Date of birth (mm/dd/yyyy)

Phone number ⓘ

Social Security number ⓘ

Cancel Continue

Select a **login ID**, **password**, and **security question**, then select **continue**.

Schwab Alliance Activation - rdi x create credential x ^GSPC Interactive Stock Chart x Client & Account Servicing - Po x +

https://sws-gateway.schwab.com/ui/host/#/create-credential

charles SCHWAB

Account Information Confirm Identity Create Credential Security Preferences

Create your login credentials

To securely access your account, please create your Schwab login ID and password.

Login ID

Password

Confirm Password

Confirm Password

Security Question: What is your...

Favorite book?

Answer

- At least 5 characters
- No special characters
- No leading and trailing spaces

Cancel Continue

Last, **choose how often you want 2- step verification.**

“Every time I log in” will ask you to verify every time you log in.

“When I am not on a trusted device” will ask you to verify every time you’re on a *different* device other than the phone, computer, iPad, or tablet that you normally use.

Account Information Confirm Identity Create Credential Security Preferences

Your Schwab login info is all set.

Choose how often you want 2-step verification

What is 2-step verification?

Every time I log in
Mobile device required

When I am not on a trusted device