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)

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

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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.

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