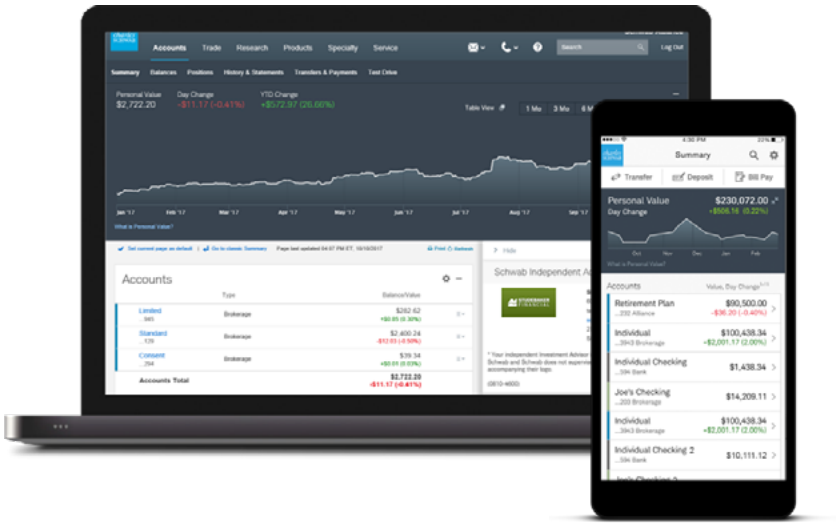
charles SCHWAB

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.

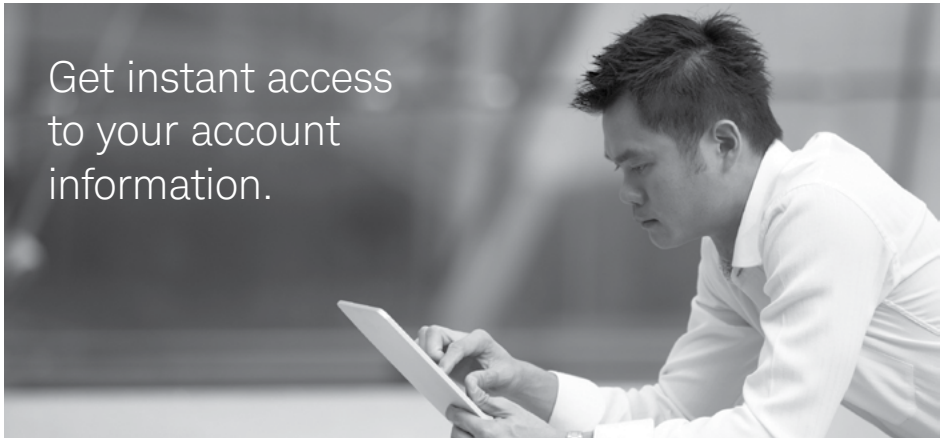


For illustrative purposes only.

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.



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

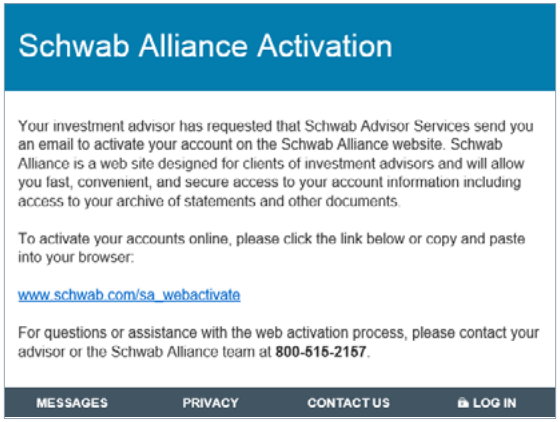
Set up account access one of two ways

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

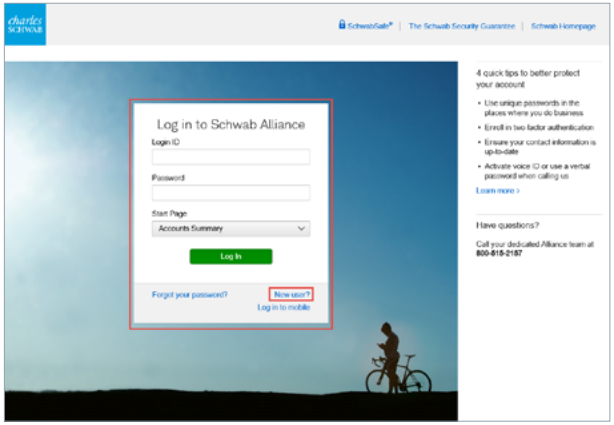
You'll receive an email with a link to get started. If the link has expired, ask your advisor to resend.



OPTION 2

1 Initiate enrollment on your own

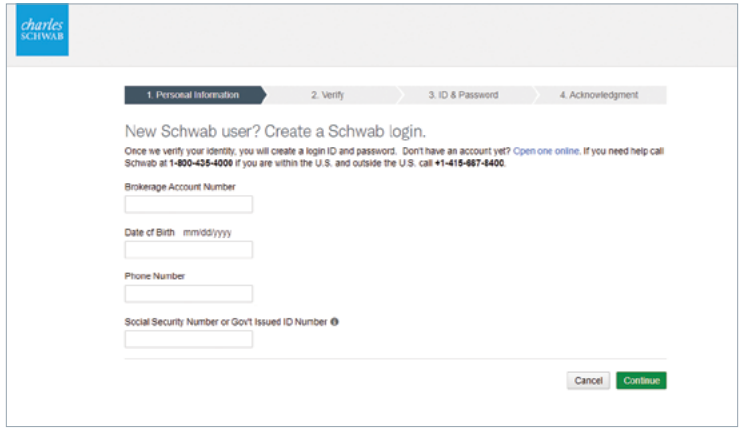
Go to schwaballiance.com and click "New User?"



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

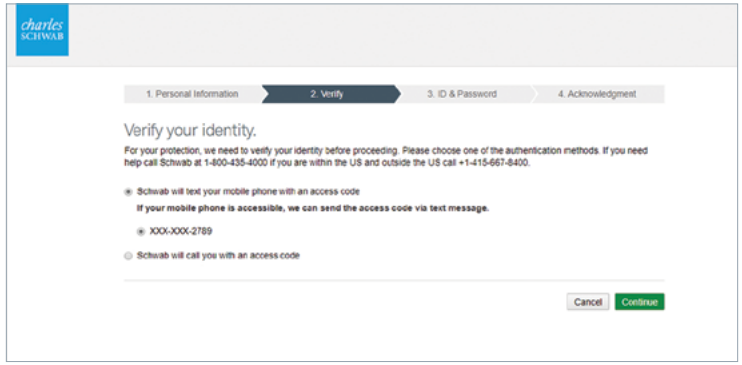
2 Verify your personal information

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.



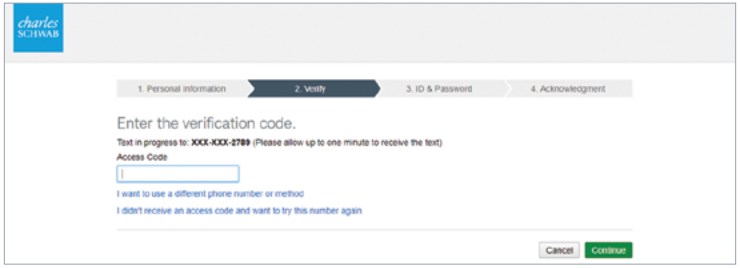
3 Verify your identity

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



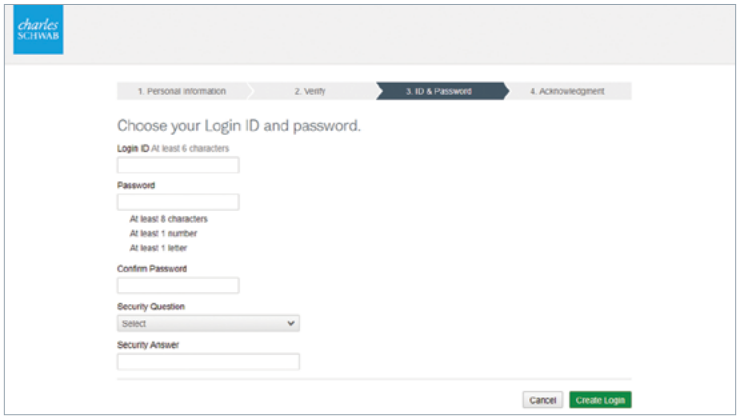
4 Enter the verification code

Type in the access code provided by Schwab.



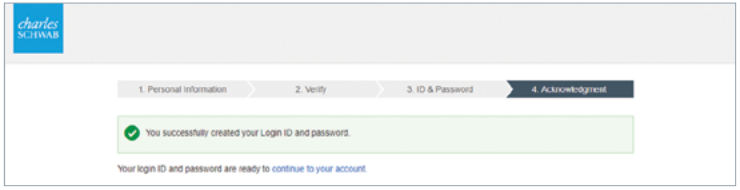
5 Create your login ID, password, and security question and answer

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.



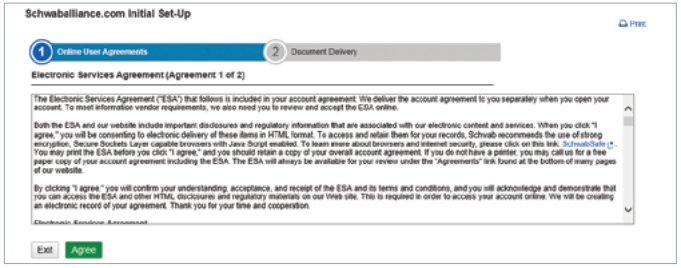
6 Acknowledgment

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



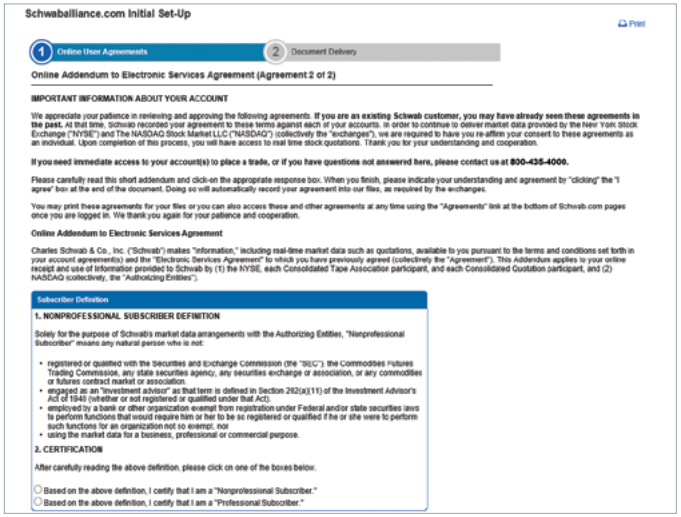
7 Review and accept user agreements

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



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.



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."

GET IT ON Google Play

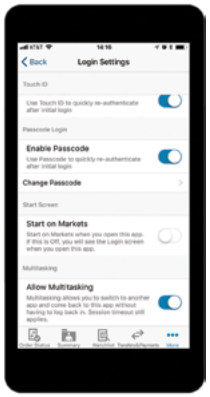
Download on the App Store

2 Log in to access your account

Use the same Schwab Alliance credentials you use online.

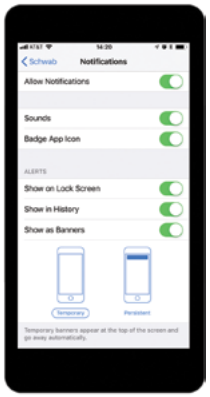
3 Check your mobile app settings

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.



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.
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