

Schwab.com Guide

Explore Schwab's online
tools and resources.



charles
SCHWAB

Own your tomorrow.

Get Started Quickly

Log in: Go to Schwab.com and enter your User ID and Password. Be sure to **log out** and close your browser after you end your session.

The screenshot shows the Charles Schwab homepage. At the top, there's a navigation bar with links like 'Log In', 'Find a Branch or Consultant', 'Contact Us', and a phone number. Below this is a secondary navigation bar with categories like 'INVEST', 'BANK', 'TRADING', etc. A large banner image features a couple walking on a pier with the text 'Own your tomorrow. A modern approach to wealth management.' A 'New User' registration pop-up is visible, listing required information: Social Security Number, Brokerage Account Number, Date of birth, and Home Telephone Number. At the bottom, there's a 'I'd like to' dropdown menu and a market data ticker.

1. Open an Account button

2. Forgot Password? link

3. New User tab in the login box

4. I'd like to dropdown menu

5. Quote button in the market data section

DJIA	NASDAQ	S&P 500	Russell 2000	Time (ET)
16,837.37 +320.87 (+1.94%)	4,677.99 +120.04 (+2.63%)	1,975.02 +42.79 (+2.21%)	1,051.50 +17.60 (+1.70%)	3:29:04 PM

- 1 **New to Schwab?** Click the “Open an Account” button and complete an application.
- 2 **Forgot your password?** Click **Forgot Password**. Or call 1-800-435-4000.
- 3 **First-time login?** Go to Schwab.com and select the **New User** tab in the login box. Have your brokerage account number(s) ready and then follow the simple steps to create your **User ID** and **Password**.
- 4 **Looking for a shortcut?** Select a ‘quick link’ from the menu.
- 5 **Researching stock prices?** Enter the ticker symbol to get a quote.

Accounts

Manage and monitor your accounts.

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Message Center(0) Contact Us Feedback Help

Log Out

Accounts Trade Research Products Guidance Service

Summary Balances Positions History & Statements Portfolio Performance Transfers & Payments Message Center

Show All Schwab Accounts

1

2

3

4

5

All Brokerage Accounts

Total Accounts Value *
\$15,000.00

Total Cash & Cash Investments
\$500.00

Total Market Value
\$14,500.00

Day Change **
+\$250.00 (1.67%)

Brokerage Accounts

Name	Account	Cash & Cash Investments	Account Value	Day Change **	Next Steps
Investing		\$0.00	\$10,500.00	+\$200.00 (1.90%)	
Trading		\$500.00	\$4,500.00	+\$50.00 (1.11%)	
Totals		\$500.00	\$15,000.00	\$250.00 (1.67%)	All Positions

Charles Schwab Bank

Name	Account	Available Balance	Balance Owed	Activity	Next Steps
Investor Checking		\$100.00			
High Yield Savings		\$3,000.00			
Quicken Loans Mortgage			\$75,000.00		
Totals		\$3,100.00	\$75,000.00		All Balances

Account summary is the central location for viewing daily account values, including market fluctuations.

Key Features:

- 1
- Customize your dashboard view of current and historical account
- Balances**
- .
- 2
- Monitor your
- Positions**
- , including market value, unrealized gain or loss, and cost basis.
- 3
- Review account
- History & Statements**
- , including tax forms and realized gain or loss on transactions.
- 4
- Evaluate the risk and return of your investments using
- Portfolio Performance**
- and Portfolio Checkup Tools.
- 5
- Transfer**
- money between accounts, wire funds, elect tax withholding for IRAs, and enroll in Schwab MoneyLink®

Trade

Place trades and monitor market opportunities.

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Message Center(0) Contact Us Feedback

Accounts Trade Research Products Guidance Service

Stocks & ETFs Options Mutual Funds Bonds CDs Futures IPOs Watchlist Trading Tools Order Status

Account

Available to Trade: \$6,000.00
using Cash & Cash Investments

1

2

3

Key Features:

- 1
- To place a
- Trade**
- , select an investment type and choose the correct account.
- 2
- Create a
- Watchlist**
- for quotes, analyst ratings, company performance, and more.
- 3
- Access advanced
- Trading Tools**
- and dedicated trading specialists.

Research

Make informed investment decisions.

The screenshot shows the Charles Schwab Research page. At the top, the 'Research' tab is highlighted in the main navigation bar. Below it, a sub-navigation bar includes 'Markets', 'Stocks', 'Options', 'Mutual Funds', 'ETFs', 'Bonds & Fixed Income', 'CDs & Money Markets', and 'Learning Center'. Callout 1 points to the 'Markets' link. Callout 2 points to the 'ETFs' link. Callout 3 points to the 'Learning Center' link. The page content includes sections for 'U.S. Markets', 'International', 'Industries', 'Charts', 'Calendar', 'Ideas & Strategies', 'Market Insight', and 'Reports'. There are also sections for 'Markets & Economy', 'Investment Strategies', 'Retirement', 'Personal Finance & Planning', and 'Webcasts'. A 'Schwab Market Update' section is visible on the right, along with a 'DJIA' chart and a table of market data.

	DJIA	NASDAQ	S&P 500
9:30am	16,196.41	222.57	1.4%
4pm	16,196.41	222.57	1.4%
▲ DJIA	16,196.41	222.57	1.4%
▲ NASDAQ	4,435.96	98.46	2.3%
▲ S&P 500	1,895.58	30.80	1.7%

Market Insight gives you up-to-date financial news from industry experts.

Key Features:

- 1 Monitor the **Markets** with detailed coverage of earnings reports, breaking news, and commentaries from Schwab and independent sources.
- 2 Research **Stocks**, **Exchange-Traded Funds (ETFs)**, and **Fixed Income** with our screeners, charts, and comparison tools. For expert picks and ratings, see Schwab Stock Lists® and Select Lists.
- 3 Browse educational resources on the **Learning Center**, including articles, workshops at branches, and live webinars.

Products

Find the right products and services for all your financial needs.

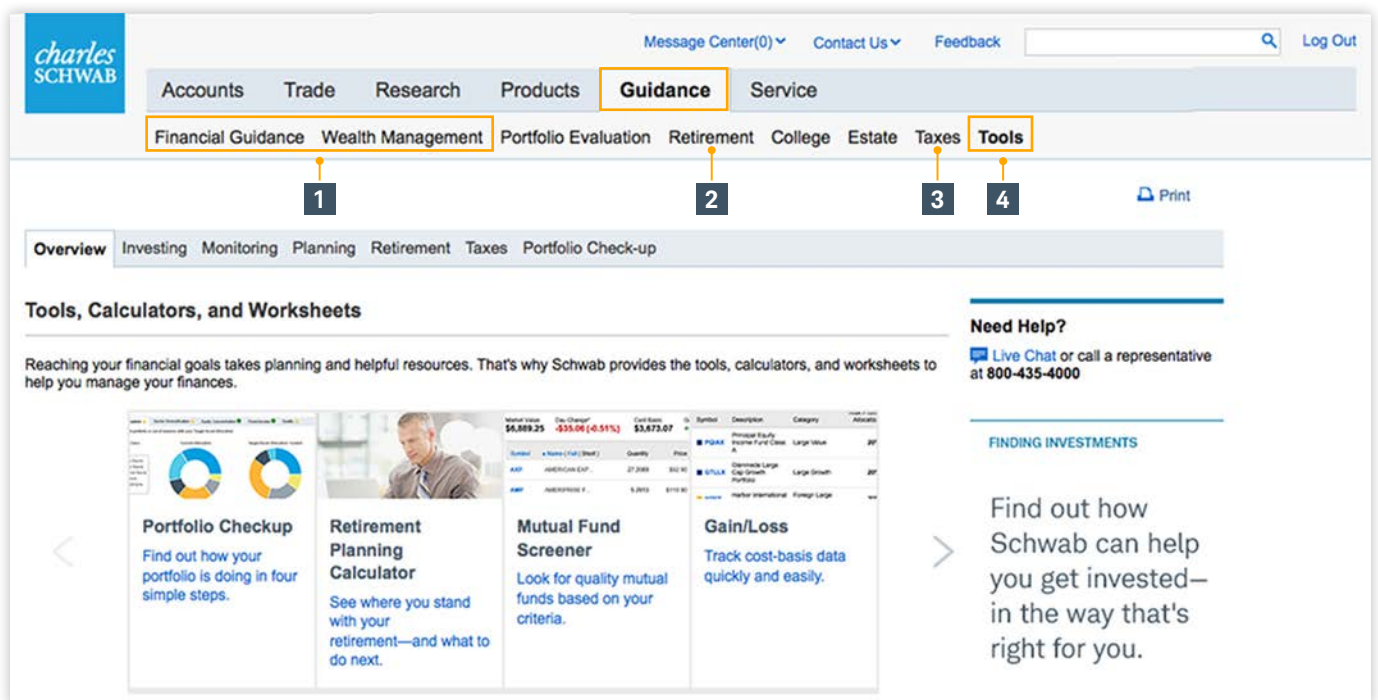
The screenshot shows the Charles Schwab Products page. The 'Products' tab is highlighted in the main navigation bar. Below it, a sub-navigation bar includes 'Overview', 'Invest', 'Bank', 'Intelligent Portfolios', 'Retirement', 'Cash Management', and 'Portfolio Solutions'. Callout 1 points to the 'Overview' link. Callout 2 points to the 'Portfolio Solutions' link.

Key Features:

- 1 Get an **Overview** of Schwab's wide range of products and services.
- 2 Explore Schwab's **Portfolio Solutions**.

Guidance

Get the tools, guidance, and resources you need to manage and evaluate your portfolio.



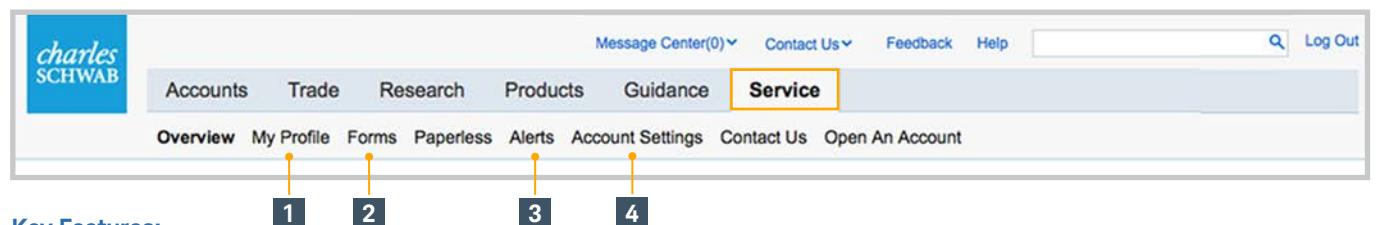
Tools provides you with important resources for planning and calculating your finances.

Key Features:

- 1 Learn about **Financial Guidance** and **Wealth Management** services.
- 2 Get answers to your **Retirement** questions and see where you stand today with our Retirement Planning Calculator.
- 3 Find in-depth **Tax** resources, key dates, and important forms.
- 4 Looking for a good place to start? Visit our **Tools** hub.

Service

Take care of routine account tasks and enroll in paperless services.



Key Features:

- 1 Use **My Profile** to update your contact information, change login details, or to create a security question & answer.
- 2 Find **Forms** by account type or topic, such as transfers/payments, features/services, and tax/legal.
- 3 Sign up to receive **Alerts** on your portfolio and other topics: investing insights, research, securities, and bonds.
- 4 Order checks, enroll for direct deposit, or update important **Account Settings**, such as beneficiary designations.

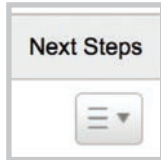
Quick Tips

Find answers quickly through helpful shortcuts located on [Schwab.com](https://www.schwab.com).



- 1 Want to connect locally? Visit [schwab.com/branch](https://www.schwab.com/branch) to **find a Branch or Consultant** near you.
- 2 Have a question or need assistance? **Contact us** by phone, email, or secure message.
- 3 Want information on a specific topic? **Search all of Schwab.com** to see what's available.

Log in to [Schwab.com](https://www.schwab.com) for navigation help:



After you log in, click the **Next Steps** button to navigate throughout the site.

Explore these resources:

[schwab.com/insights](https://www.schwab.com/insights)
[schwab.com/workshops](https://www.schwab.com/workshops)
[schwab.com/LifeEvents](https://www.schwab.com/LifeEvents)

Investors should carefully consider information contained in the prospectus, including investment objectives, risks, charges, and expenses. You can request a prospectus by calling Schwab at 1-800-435-4000. Please read the prospectus carefully before investing.

Brokerage Products: Not FDIC-Insured • No Bank Guarantee • May Lose Value

Investing involves risk, including possible loss of principal.

Schwab does not provide specific individualized tax or legal advice. Where specific advice is necessary or appropriate, please consult with a qualified attorney, tax advisor, or CPA.

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