EASY, SECURE ACCESS

Sign up for online access to your accounts. Schwab Alliance and eDelivery give you access to your information virtually anytime, anywhere.

Designed for investors like you, these helpful tools enable you to stay informed about your accounts while still relying on the one-on-one guidance provided by your independent advisor.



charles SCHWAB

Sign up

for Schwab Alliance and eDelivery today.

TIP: Please have your most recent account statement on hand. If you don't have a statement available, please contact your advisor for assistance. Having your advisor initiate your online enrollment will allow you to skip steps 1 and 3.

HERE'S A SIMPLE STEP-BY-STEP GUIDE:

1 Go to schwaballiance.com and click the "New User?" link

You DO NOT have to complete this step if your advisor initiates your online enrollment. Simply click the link provided by your advisor via email.

premium sen	rice designed to complement the	expertise and the personal advice of	your advisor.
Login ID		New User?	a SchwabSafe
Password		Forgot your Password?	VeriSign Secured
Start Page	Accounts Summary		VERIFY
	Save as your start page		The Schwab Security Guarantee

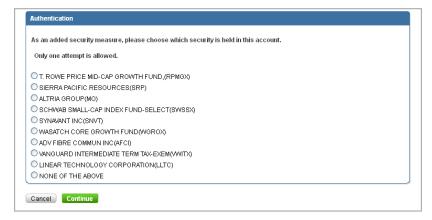
2 Enter account information
Your brokerage account number is the 8-digit number at the top of your account statement. If you own more than one account, you can enter

any one of those account numbers.

Client Identification		
Please enter the following in	formation :	VeriSign
Social Security Number :	Don't have a Social Security Number? []	VERIFY
Brokerage Account Number :		
Date of Birth :	MM / DD / YYYY	
Home Phone Number:		

Authenticate via account securities Refer to your account statement to confirm which of the securities listed is held in your account. If your account is new and assets haven't transferred yet, select "NONE OF THE ABOVE." You DO NOT have to

transferred yet, select "NONE OF THE ABOVE." You DO NO complete this step if your advisor initiates your online access to Schwab Alliance.



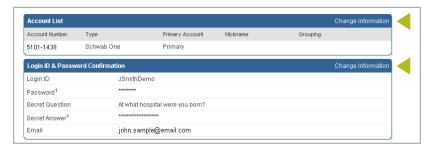
4 Select primary account Create a nickname for your account and select the purpose (optional).

			Personalize Your Accou	Int Display
Account Number	Туре	Primary Account	Create Nickname	This Account is for(Optional)
5101-1438	Schwab One	0		Select One

Greate your login ID and passwordChoose a secret question and answer to make any future password resets easier.

Login ID & Password Setup	
Create a Login ID	
Enter a Login ID :	JSmithDemo 6-20 characters with at least 1 letter
Create a Password	
Enter Password :	6-8 characters with at least 1 number between letters
Re-enter password :	000000
Choose a secret question :	At what hospital were you born?
Secret question answer:	5-30 characters
Re-enter answer:	••••••

Verify information If anything is inaccurate, click "Change Information."



Review and accept user agreements

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

Accepted ND ACREED I acknowledge that I have read the preceding terms and conditions, and that I understand, assent to, and agree to comply with, those terms and conditions.

Ent. Agree.

Enroll in eDelivery Sign up for electronic delivery of key account docume

Sign up for electronic delivery of key account documents. You can enroll all eligible accounts, or select specific accounts or documents you wish to enroll.

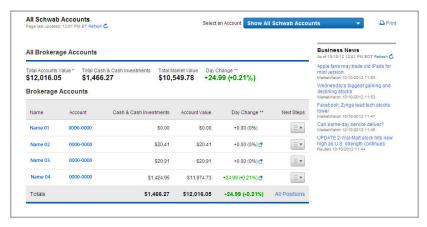
Bootiment Bent	ery Preferences				
Switch to paperless s	services and reduce the	amount of mail you recei	ve. Read our Paperless Documents Ir	nformed Consent 📑 .	
Review your paperles	ss preferences and click	Go to Schwab.com below	v. If you don't want electronic delivery t	for certain documents, unsel	ect those for each account.
Enroll all eligible a	iccounts				
A named Number	Assessed Trans	Walanaa			
Account Number	Account Type	Nickname	Trade Confirmations 🗆	Statements 🖂	Shareholder Documents 🖂
5101-1438	Schwab One		▽	✓	₩.
Email Address	john.sample@e	mail.com			
You can change your	document delivery prefe	rences and email addre	ss at anytime on Schwab.com.		
	document delivery prefe	rences and email addre:	ss at anytime on Schwab.com.		
Consent to receive p	paperless documents		ss at anytime on Schwab.com.		

If you already have online access to Schwab Alliance, go directly to schwab.com/sa_gopaperless to sign up for eDelivery. If you have any questions or need further assistance, call a Schwab Alliance specialist at 800-515-2157 or ask your investment advisor to initiate your online enrollment.



Monitor your investments easily and securely.

- · Get instant access to your account information.
- Count on fast, secure, paperless delivery of important documents including account statements, trade confirmations, and tax reports.¹
- · Access up to 10 years of archived materials.
- Check the status of transactions your investment advisor has made on your behalf.
- View a full, clear snapshot of your accounts—including balances and a summary of individual holdings.
- See all of your Schwab accounts—including brokerage, bank, and employer-sponsored accounts—in a single view.



Instant access to your account information

Ask your advisor to initiate your online access to Schwab Alliance and eDelivery or simply register at **schwaballiance.com**. It's free, fast, and easy.

 You must be listed as the account owner in order to enroll in eDelivery. You may also be eligible for lower electronic equity trade commissions if you enroll in eDelivery. Sign up for online access today, or call a Schwab Alliance specialist at 800-515-2157.

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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