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, 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

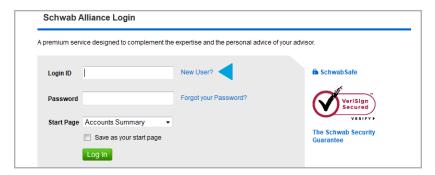
Sign up today

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 "New User?"

You can skip this step if your advisor initiated your online enrollment. Simply click the link provided by your advisor via email within seven days.¹



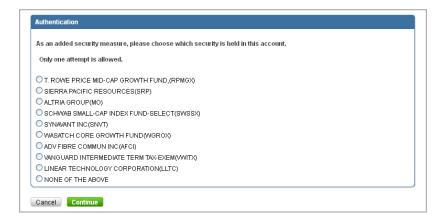
2 Enter account information
Your brokerage account number is the eight-digit number at the top of your account statement. If you own more than one account, you can enter any one of those account numbers.

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

If the link expires, ask your advisor to resend.

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

listed is held in your account. If your account is new and assets haven't transferred yet, select "NONE OF THE ABOVE." You can skip this step if your advisor initiated your online enrollment.



Select primary account

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

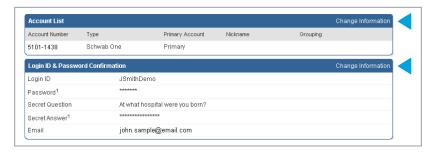
			Personalize Your Accou	• •
Account Number	Туре	Primary Account	Create Nickname	This Account is for(Optional)
5101-1438	Schwab One	0		Select One

Create your login ID and password

Choose a secret question and answer to make any future password resets easier. For your own security, do not share this information with anyone, including your advisor.

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 :	•••••
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.

	Addendum and the Agreement as relates to information Providers. To the extent you have any claims against or by NASDAD (not involving Schwab) arising out of the Agreement or this Addendum, those claims shall be governed by and construed and enforced in accordance with let leave of the State of Marjanda without reference to principles of conflicts of law, and you consent to submit to the justification of the counts of or the State of Marjandin connections with any such claim.	
	ACCEPTED AND AGREED: 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.	l
	Exit Agree	l
(1	0511-3023)	l

Enroll in paperless delivery Sign up for electronic delivery of key account documents. You can enroll all

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.

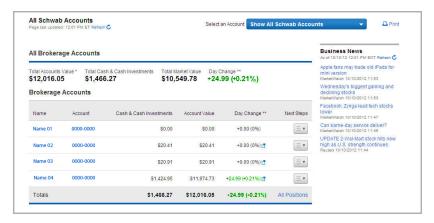
Document Deliv	ery Preferences				
Switch to paperless	services and reduce the	amount of mail you receiv	ve. Read our Paperless Documents I	Informed Consent 🖪 .	
Review your paperle	ss preferences and click	Go to Schwab.com belov	v. If you don't want electronic delivery	for certain documents, unse	lect those for each account.
Enroll all eligible	accounts				
Account Number	Account Type	Nickname	Trade Confirmations 🖵	Statements 💬	Shareholder Documents 🖂
5101-1438	Schwab One		~	V	~
Email Address	john.sample@e	mail.com			
You can change you	document delivery prefe	rences and email addres	ss at anytime on Schwab.com.		
Consent to receive	paperless documents				
You consent to recei	ve and read in electronic	format the Paperless Do	cuments Informed Consent 🖪 .		
Exit Go to Schw	ah com				

If you already have online access to Schwab Alliance, go directly to **schwab.com/sa_gopaperless** to sign up for electronic delivery. 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.

charles SCHWAB

Monitor your investments easily and securely

- Get instant access to your account information—online or on the go with Schwab mobile apps.
- Count on fast, secure, paperless delivery of important documents including account statements, trade confirmations, and tax reports.²
- · 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.



Get instant access to your account information.

Ask your advisor to initiate your online access to Schwab Alliance, 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 electronic delivery. You may also be eligible for lower electronic equity trade commissions if you enroll in electronic delivery. Sign up for online access today, or call a Schwab Alliance specialist at 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.

©2013 Charles Schwab & Co., Inc. (Schwab). All rights reserved. Member SIPC.

AHA (1013-7457) MKT70909-01FM (10/13) 00106949