

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.

1. If the link expires, ask your advisor to resend.

3 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 can skip this step if your advisor initiated your online enrollment.

Authentication

As an added security measure, please choose which security is held in this account.

Only one attempt is allowed.

☐ T. ROWE PRICE MID-CAP GROWTH FUND.(RPMGX)

☐ SIERRA PACIFIC RESOURCES(SRP)

☐ ALTRIA GROUP(MO)

☐ SCHWAB SMALL-CAP INDEX FUND-SELECT(SWSSX)

☐ SYNAWANT INC(SNVT)

☐ WASATCH CORE GROWTH FUND(WGROX)

☐ ADV FIBRE COMMUN INC(AFCI)

☐ VANGUARD INTERMEDIATE TERM TAX-EXEM(VWITX)

☐ LINEAR TECHNOLOGY CORPORATION(LLTC)

☐ NONE OF THE ABOVE

Cancel

Continue

4 Select primary account

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

Account List

Personalize Your Account Display

Account Number	Type	Primary Account	Create Nickname	This Account is for(Optional)
5101-1438	Schwab One	<input type="radio"/>	<input type="text"/>	<div>Select One</div>

If any of your accounts missing, please contact your service team or call us at 800-435-4000.

Cancel

Continue

5 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:

6 Verify information

If anything is inaccurate, click "Change Information."

Account List

Change Information

Account Number	Type	Primary Account	Nickname	Grouping
5101-1438	Schwab One	Primary		

Login ID & Password Confirmation

Change Information

Login ID	JSmithDemo
Password ¹	*****
Secret Question	At what hospital were you born?
Secret Answer ¹	*****
Email	john.sample@email.com

7 Review and accept user agreements

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

Read the Schwab Alliance Terms and Conditions, Schwab Alliance Privacy Policy, Schwab Alliance Paperless Documents Informed Consent, Schwab Alliance Addendum and the Agreement as relates to Information Providers. To the extent you have any claims against or by NASDAQ (not involving Schwab) arising out of the Agreement or this Addendum, those claims shall be governed by and construed and enforced in accordance with the laws of the State of Maryland without reference to principles of conflicts of law, and you consent to submit to the jurisdiction of the courts of or for the State of Maryland in connection 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.

Exit

Agree

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8 Enroll in paperless delivery

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 Delivery Preferences

Switch to paperless services and reduce the amount of mail you receive. Read our [Paperless Documents Informed Consent](#).

Review your paperless preferences and click Go to Schwab.com below. If you don't want electronic delivery for certain documents, unselect those for each account.

☒ Enroll all eligible accounts

Account Number	Account Type	Nickname	Trade Confirmations	Statements	Shareholder Documents
5101-1438	Schwab One		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Enter an email address to receive your paperless documents

Email Address john.sample@email.com

You can change your document delivery preferences and email address at anytime on Schwab.com.

Consent to receive paperless documents

You consent to receive and read in electronic format the [Paperless Documents Informed Consent](#).

☐ I Consent

Exit

Go to Schwab.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.

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.

All Schwab Accounts
Page last updated: 12:01 PM ET Refresh

Select an Account: **Show All Schwab Accounts** Print

All Brokerage Accounts

Total Accounts Value *	Total Cash & Cash Investments	Total Market Value	Day Change **
\$12,016.05	\$1,466.27	\$10,549.78	+24.99 (+0.21%)

Brokerage Accounts

Name	Account	Cash & Cash Investments	Account Value	Day Change **	Next Steps
Name 01	0000-0000	\$0.00	\$0.00	+0.00 (0%)	
Name 02	0000-0000	\$20.41	\$20.41	+0.00 (0%)	
Name 03	0000-0000	\$20.91	\$20.91	+0.00 (0%)	
Name 04	0000-0000	\$1,424.95	\$11,974.73	+24.99 (+0.21%)	
Totals		\$1,466.27	\$12,016.05	+24.99 (+0.21%)	All Positions

Business News
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Apple fans may trade old iPads for mini version
MarketWatch 10/10/2012 11:53

Wednesday's biggest gaining and declining stocks
MarketWatch 10/10/2012 11:53

Facebook, Zynga lead tech stocks lower
MarketWatch 10/10/2012 11:47

Can same-day service deliver?
MarketWatch 10/10/2012 11:45

UPDATE 2-Wal-Mart stock hits new high as U.S. strength continues
Reuters 10/10/2012 11:44

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.

Sign up for online access today, or call a Schwab Alliance specialist at 800-515-2157.

2. 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.

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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