



Enroll in paperless delivery

If an account is eligible, a client can enroll in paperless communications on Schwab Alliance.

The screenshot shows the Schwab Alliance website's 'Paperless Preferences' page. At the top, there is a navigation bar with the Schwab logo and links for Accounts, Trade, Research, Move Money, and Products. A search bar and utility links for Messages, Support, Profile, and Log Out are also present. The main content area is titled 'Paperless Preferences' and includes introductory text about electronic document delivery. Below this, there are two tables for account enrollment. The first table is for an 'investment Account ending in ...XXX' and the second is for an 'Individual Account ending in ...XXX'. Both tables have columns for Document Type, Enroll in Paperless (with checkboxes), and To (email address). A dropdown menu is open from the Profile icon, showing options like Security Settings, Contact Information, and Paperless. Two callout boxes provide instructions on how to interact with the interface.

investment Account ending in ...XXX

Document Type	Enroll in Paperless Select all	To
Statements & Account Documents ?	<input checked="" type="checkbox"/>	bill.nickel@email.com
Trade Confirmations ?	<input checked="" type="checkbox"/> eNotification	nancy.nickel@email.com Edit
Shareholder Materials ?	<input checked="" type="checkbox"/>	nancy.nickel@email.com Edit
Tax Forms ?	<input checked="" type="checkbox"/>	nancy.nickel@email.com Edit
Year-End Gain/Loss Reports ?	Ineligible	

Individual Account ending in ...XXX

Document Type	Enroll in Paperless Select all	To
Statements & Account Documents ?	<input checked="" type="checkbox"/>	bill.nickel@email.com
Trade Confirmations ?	<input type="checkbox"/> eNotification	No Email Address On File Add
Shareholder Materials ?	Ineligible	No Email Address On File Add
Tax Forms ?	<input checked="" type="checkbox"/>	nancy.nickel@email.com

Your client clicks the **Profile** icon, then selects **Paperless** from the drop-down menu.

The client can then choose **Enroll in Paperless** options by checking the corresponding boxes checkboxes.