

Easy,  
secure  
access

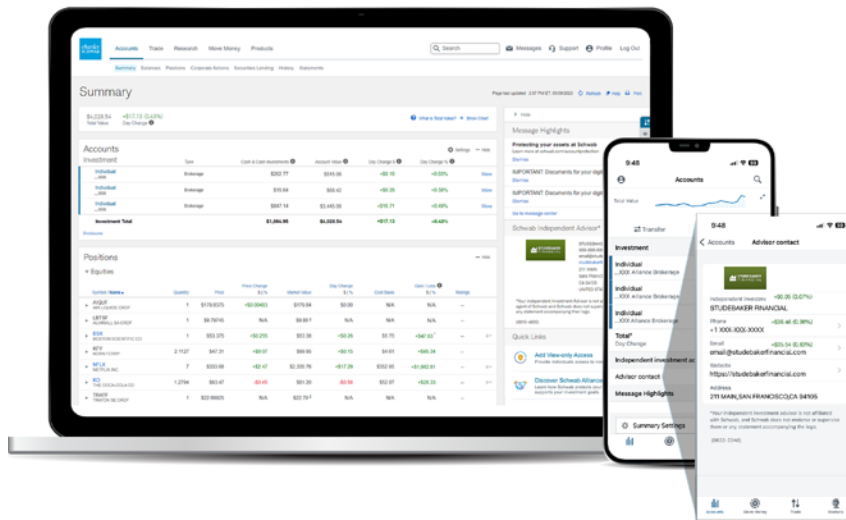


Signing up for Schwab Alliance gives you access to your account information virtually anytime, anywhere, while saving time and paperwork.

Monitor your accounts easily and securely

- ✓ Get instant access to your account information online—or on the go with the Schwab mobile app.
- ✓ Stay informed of the status of requests and securely approve transactions.
- ✓ Keep your contact information up-to-date so that you can be notified when necessary.
- ✓ Count on secure, paperless delivery of important documents, including account statements, trade confirmations, and tax reports.<sup>1</sup>
- ✓ Conveniently deposit checks with a tap of the camera on your smartphone or tablet.
- ✓ Grant view-only access to third parties, such as accountants, attorneys, and family members.
- ✓ Enhance your account security by adding two-factor authentication.

<sup>1</sup>You must be listed as the account owner to enroll in electronic delivery.



Designed for investors like you, our website and mobile app enable you to stay informed about your accounts while still relying on the one-on-one guidance provided by your independent advisor.

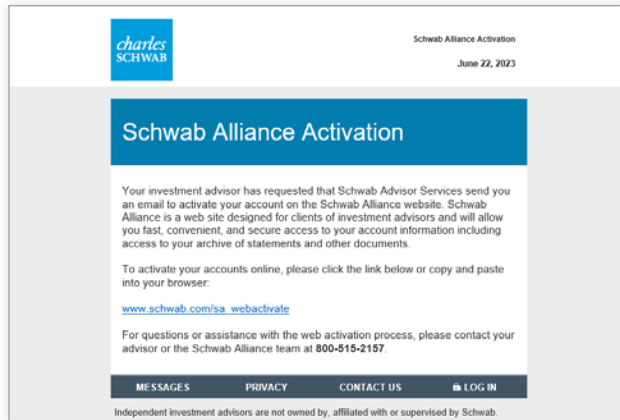
# Set up account access

## 1 Initiate your online enrollment.

There are two ways to initiate enrollment:

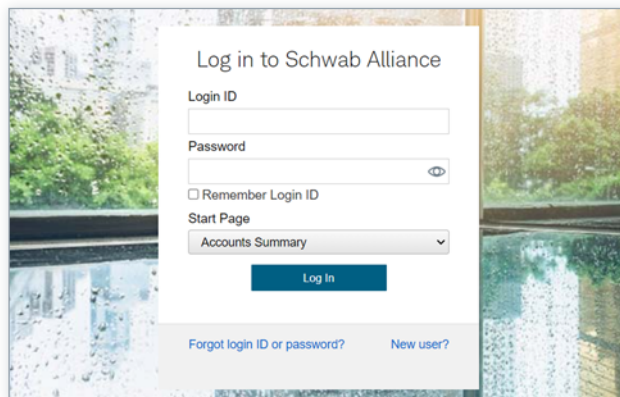
### A. Ask your advisor to initiate your online enrollment.

You will receive an email with a link to get started. If the link has expired, ask your advisor to resend it.



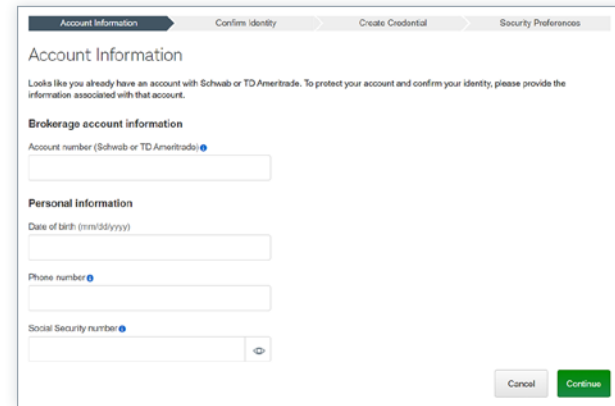
### B. Initiate enrollment on your own.

Go to [schwaballiance.com](http://schwaballiance.com) and click **New user?**



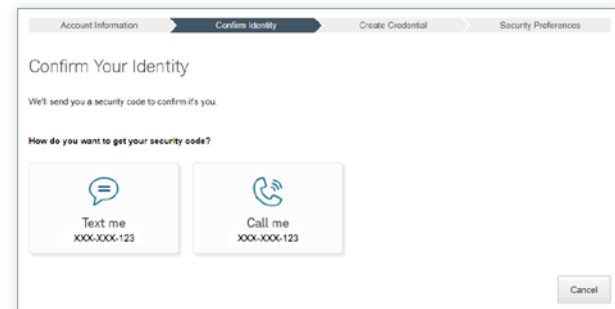
## 2 Verify your personal information.

Enter your information such as Social Security number and brokerage account number through our secure interface. Your account number can be found in an account statement or your account verification letter. If you own more than one account, you can enter any one of those account numbers.



## 3 Confirm your identity.

As an additional layer of security, Schwab will text a security code to your mobile phone or call you directly.



Note: Always use caution when logging in away from home. Visit [Schwab Safe](#) on the Schwab Alliance homepage for tips about online security.

Screenshots are for illustrative purposes only.

#### 4 Enter the security code.

Type the security code provided by Schwab.

#### 5 Create your login ID, password, and security question and answer.

Create a login ID and password unique to this account. Choose a secret question and answer to make any future password resets easier. Answers must be at least five characters and can include spaces but not contain symbols (e.g., !@#%). For your own security, do not share this information with anyone, including your advisor.

#### 6 Acknowledge your login ID and password.

You will receive confirmation that your login ID and password were created. Click **Continue to Schwab** to log in.

#### 7 Review and accept user agreements.

Review the user agreements and check the **box** for each to accept the terms.

#### 8 Enroll in paperless delivery.

Sign up for electronic delivery of key account documents. You can enroll all eligible accounts or select specific accounts for eDelivery of documents.

Enhance your account security by adding two-factor authentication and device verification. Visit the Security Center on **Schwab Alliance** for more information. Questions? Contact a Schwab Alliance specialist at **800-515-2157** or ask your investment advisor.

# Set up mobile access

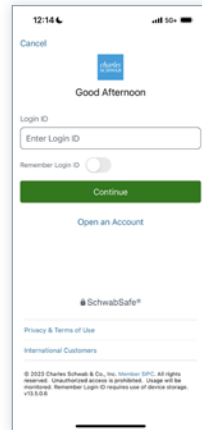
## 1 Download the Schwab Mobile app.

Visit the app store for your mobile device and search for **Schwab Mobile**.



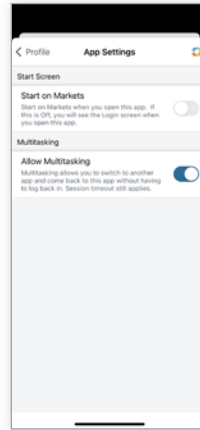
## 2 Log in to access your account.

Use the same Schwab Alliance credentials you use online.



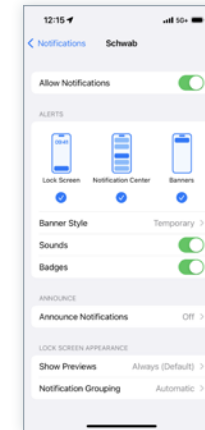
## 3 Check your mobile app settings.

Navigate to **More**, then tap **Profile & Settings** and **Login Settings**. Scroll to the bottom and turn on **Allow Multitasking** to approve transactions electronically on your device.



## 4 Turn on push notifications (for iOS/Apple devices only).

Navigate to your device **Settings** and tap **Notifications**. Ensure that Schwab Mobile is among the included apps. You can choose to display alerts on **Lock Screen**, **History**, and **Banners**. Alerts notify you of move money requests requiring your approval.



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.

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