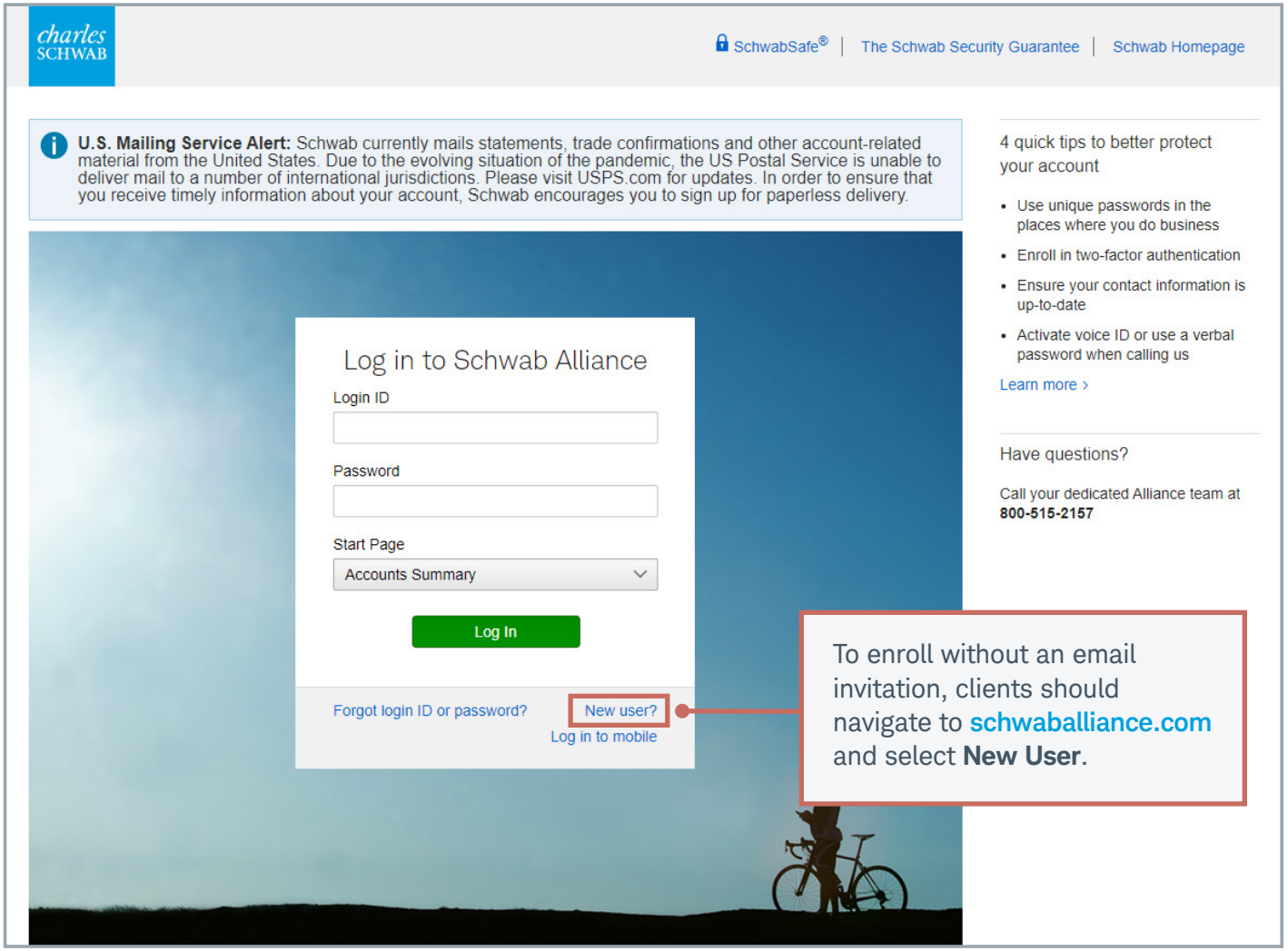
Enrollment process: Client initiation

Clients can also enroll in Schwab Alliance without an invitation. Clients can visit **schwaballiance.com** and select **New User**...

Tip

Explore the process with your clients using the **Enrollment Guide** and the **Client Learning Center**.

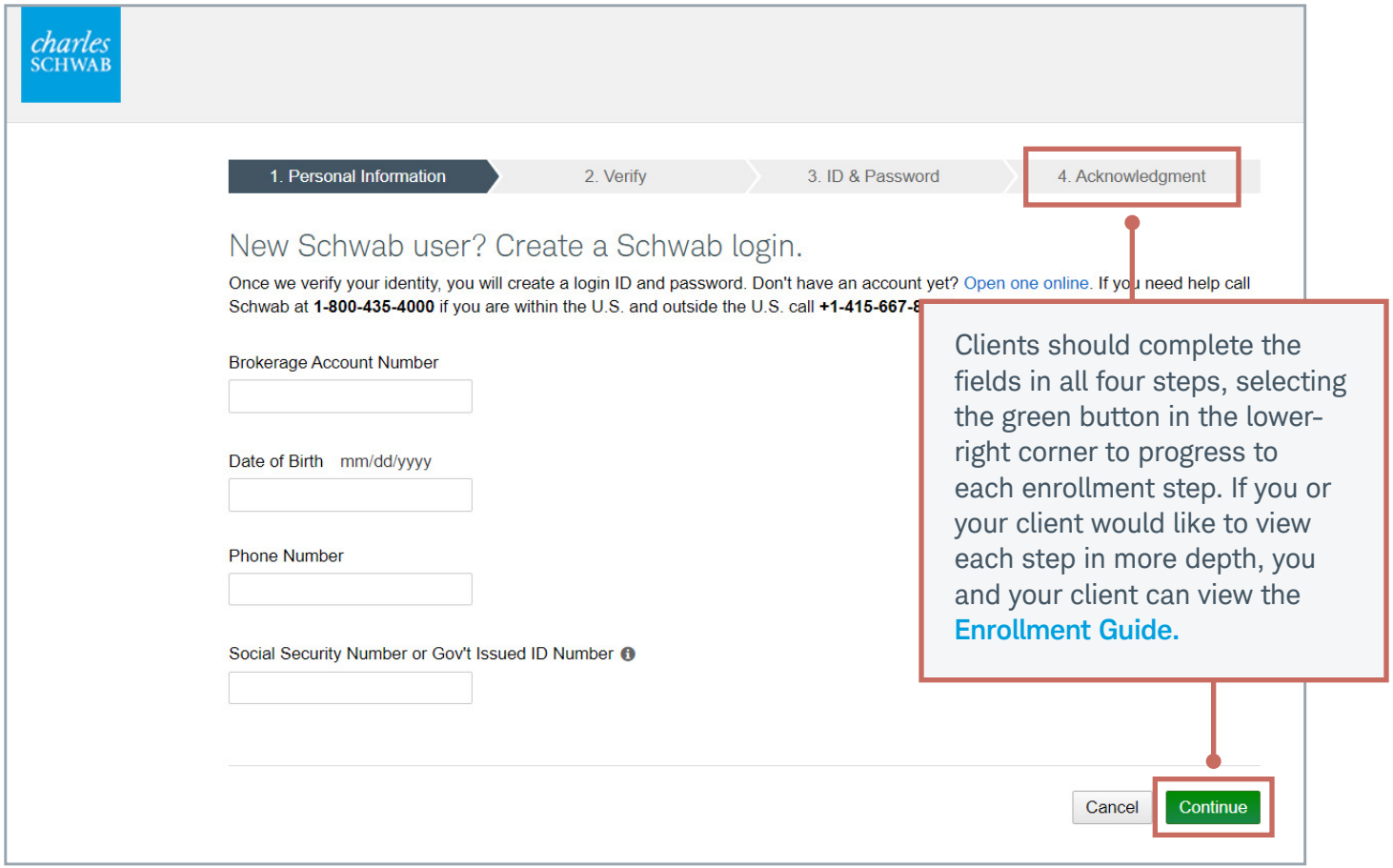


Client initiation (continued)

...to be taken directly to the enrollment page. Note that clients need their Schwab account number plus other personal information to verify their identity. Once the form is complete, your client clicks **Continue**.

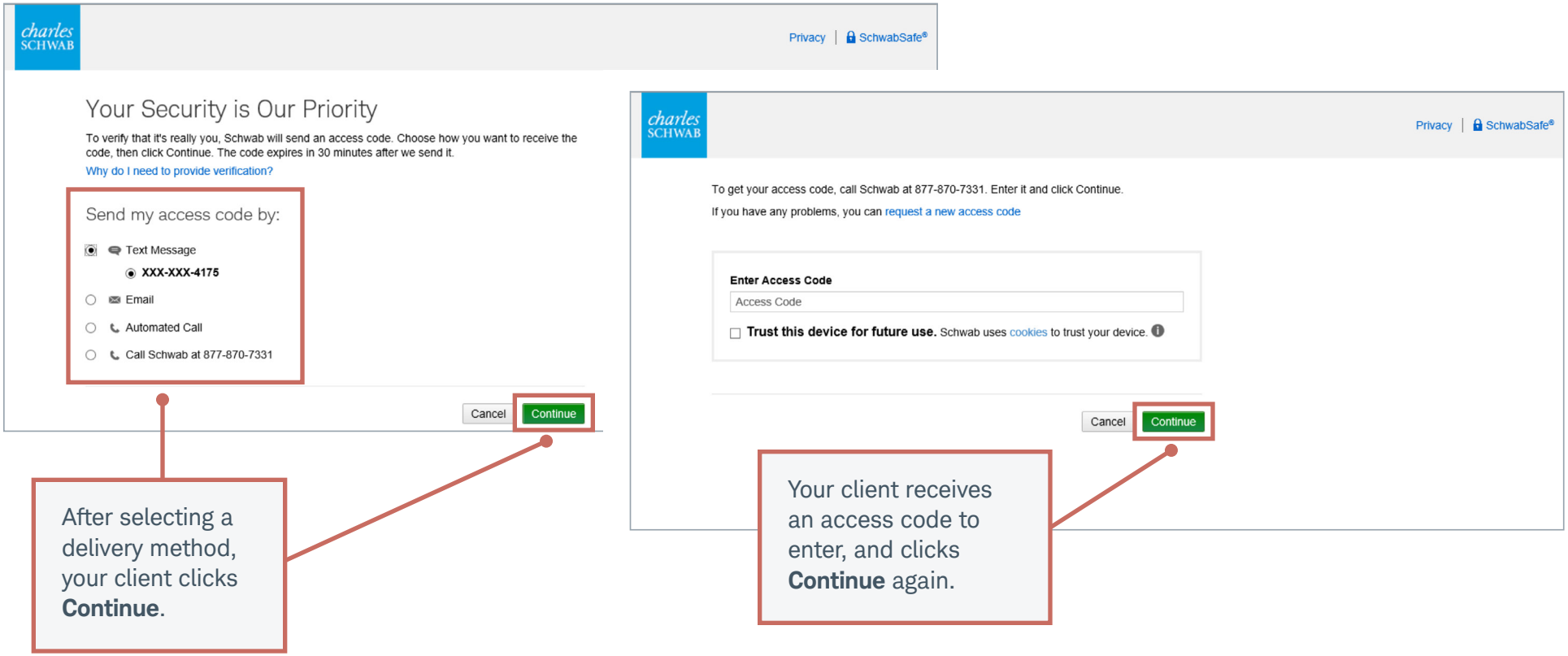
Tip

Your client can contact you for the account number.



Authentication/verification process

For security purposes, Schwab may require clients to enter a one-time access code to complete enrollment. Clients choose the method they prefer, receive the code, and enter it on the following screen.

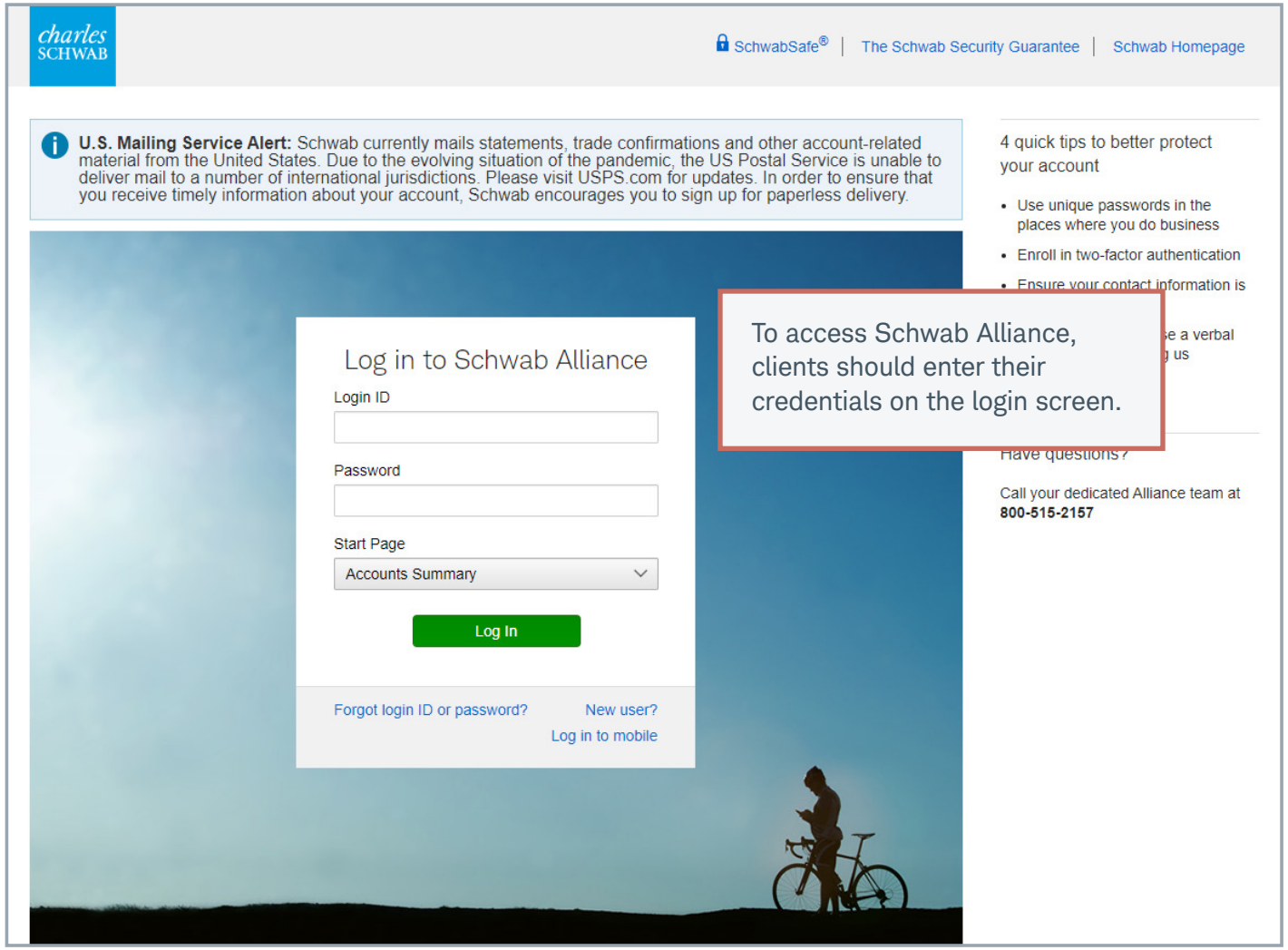


Login process: Computer

Once enrolled, clients can access Schwab Alliance at any time by visiting **schwaballiance.com** and entering their credentials.

Tip

If your client has an account but is unable to log in, the account may have been disabled. **Learn more**.

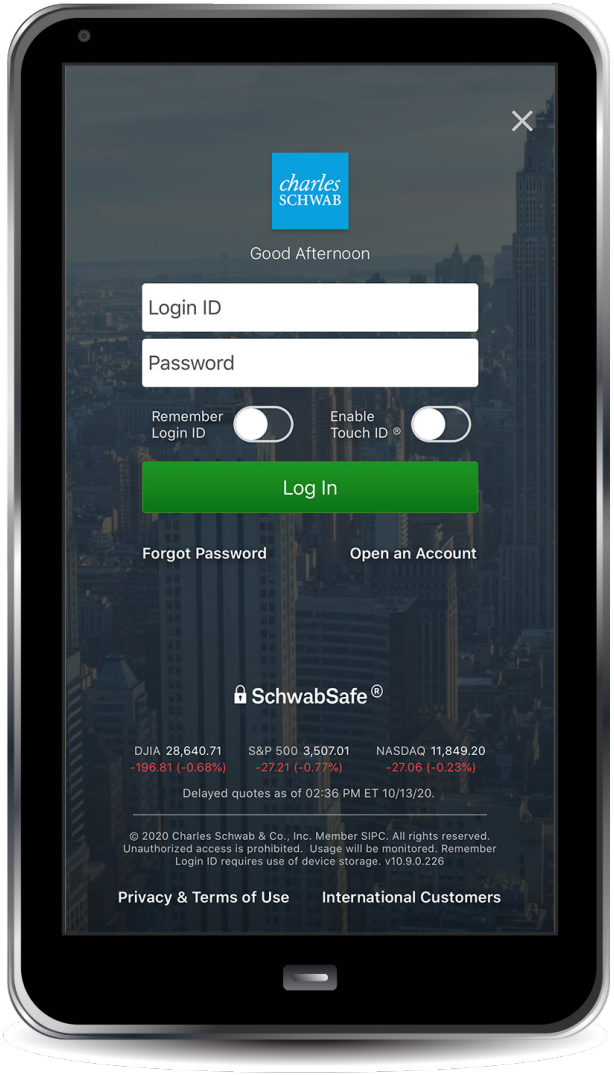


Login process: Mobile device

Mobile users have the best experience by logging into the Schwab mobile app.

Tip

The Schwab mobile app displays the tailored Schwab Alliance experience for users with Schwab Alliance credentials.



Tip

Clients can't enroll in Schwab Alliance through the Schwab mobile app, so they'll need to follow the steps to enroll before using the app.

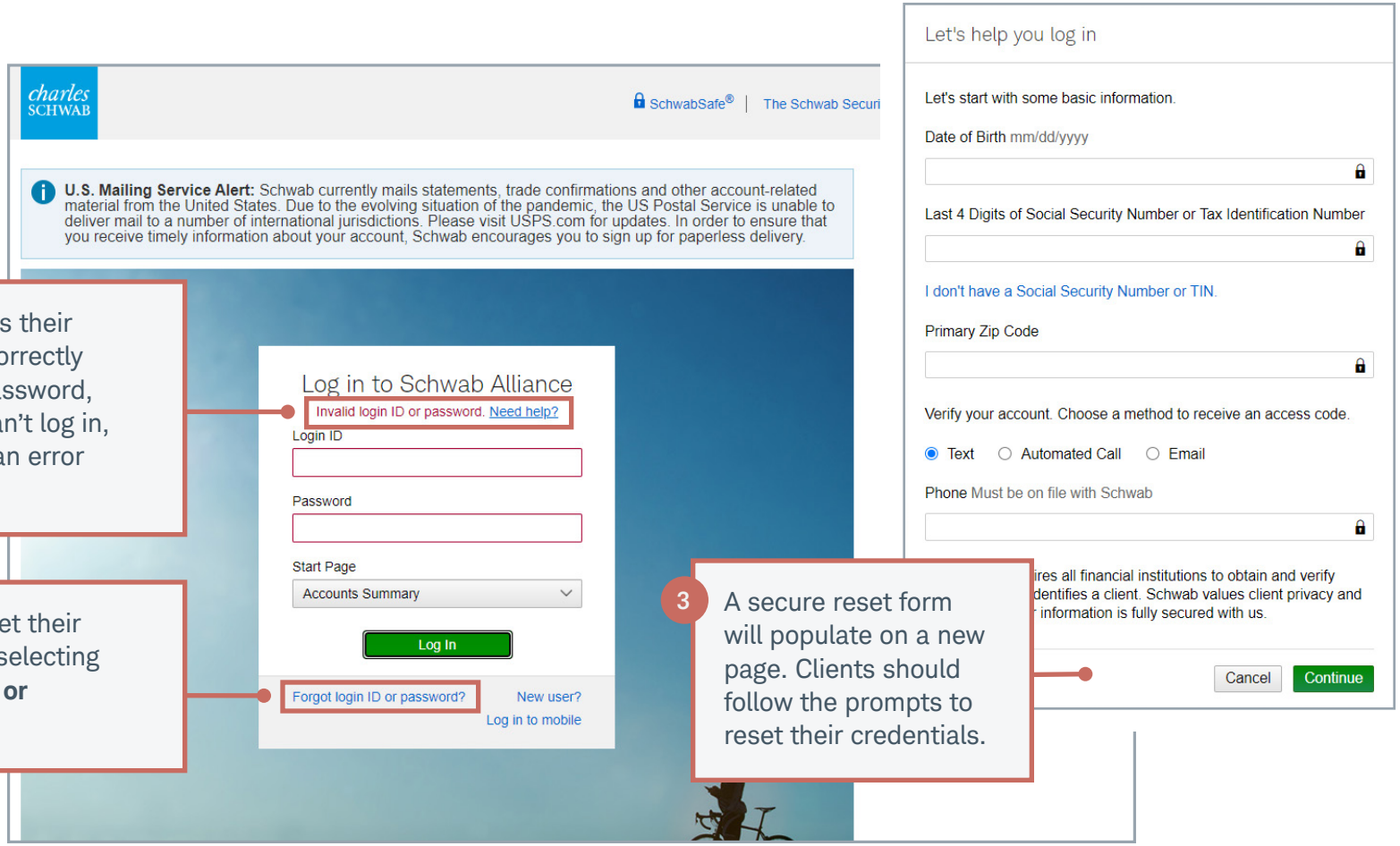
Retrieve login ID or reset password

The most frequent Schwab Alliance login issues involve forgotten or inactive credentials.

Clients should follow the steps below for both situations.

Tip

Credentials are disabled after long periods of inactivity.



1. If a client enters their credentials incorrectly forgets their password, or otherwise can't log in, they'll receive an error message.

2. Clients can reset their credentials by selecting **Forgot login ID or password?**

3. A secure reset form will populate on a new page. Clients should follow the prompts to reset their credentials.