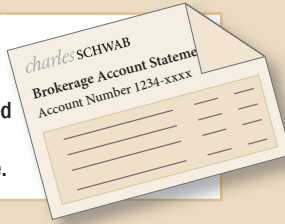


Setting Up Online Access to Your Schwab Accounts

! Please have your most recent account statement from Schwab on hand. If your account is new and you haven't yet received a statement or you don't have one handy, please contact your advisor for assistance.



Client Center Login

A premium service designed to complement the expertise and personal advice of your advisor.

Login ID **New User?**

Password [Forgot your Password?](#)

Start page: Accounts Summary Save as your start page

1 Go to schwaballiance.com and click the [New User?](#) link.

Client Identification

Please enter the following information:

Social Security Number: - - [Don't have a Social Security Number? \(F\)](#)

Brokerage Account Number: -

Date of Birth: MM / DD / YYYY

Home Phone Number: - -

2 Enter the data requested. Your brokerage account number is the eight-digit number at the top of your account statement from Schwab. If you have more than one account, you can enter any one of those account numbers to create your login ID.

Authentication

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

⚠ Only one attempt is allowed.

VERISIGN(VRSN)

SPRINT FON GROUP(FON)

REDHAT INC.(RHT)

WASTE MANAGEMENT INC.(WM)

EARTHLINK INC.(ELNK)

XLINX(XLNX)

KULICKE AND SOFFA INDUSTRIES, INC.(KLIC)

STENROE BALANCED(SRFBX)

DOW CHEMICAL CO.(DOW)

NONE OF THE ABOVE

3 Refer to your account statement to confirm which of the securities listed is held in the account you identified on the previous screen. Click the radio button next to that security. If your account is new and your assets haven't transferred yet, select "NONE OF THE ABOVE".

Note: Only one attempt is allowed. If you choose an incorrect security, you will be asked to call the Schwab Alliance team. Schwab Alliance is dedicated exclusively to serving the clients of independent investment advisors who custody at Schwab.

Account List

Account Number	Type	Primary Account	Create Nickname	This Account is for(Optional)
1234-xxxx	Schwab One	<input type="radio"/>	<input type="text"/>	Select One
1111-xxxx	Charitable Gift	<input type="radio"/>	<input type="text"/>	Select One
9999-xxxx	Schwab One	<input type="radio"/>	<input type="text"/>	Select One

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

4 Use the radio buttons in the Primary Account column to select the account you'd like displayed when you log in.

In the Create Nickname column, enter the name you'd like to use to easily identify each account.

Use the drop-down menu in the This Account is for (Optional) column to select the purpose of your account.

Login ID & Password Setup

Create a Login ID
 Enter a Login ID: 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:

Secret question answer: 5-30 characters
 Re-enter answer:

Email Address
 Confirm your email:

Changes to your email address will not update existing alert subscriptions. To update your alert subscriptions, log in and go to Account Settings under the Service tab.

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

5 Fill in the fields. Your ID must be 6–20 characters long and contain at least one letter. Your password must be 6–8 characters and have at least one number in between letters. If you forget your ID or password, Schwab will ask for your secret question to verify your identity.

Account List [Change Information](#)

Account Number	Type	Primary Account	Nickname
1234-xxxx	Schwab One	Primary	Alliance

Login ID & Password Confirmation [Change Information](#)

Login ID: Betty Smith
 Password¹: *****
 Secret Question: What's the name of the high school from which you graduated?
 Secret Answer¹: *****
 Email: betty.smith@schwab.com

¹Password and secret answer are encrypted for security purposes

6 Verify that the information listed is correct. If anything is inaccurate, click “Change Information”.

1. User agreements **2. Paperless delivery**

Electronic Services Agreement

The Electronic Services Agreement (“ESA”) that follows is included in your account agreement. We deliver the account agreement to you separately when you open your account. To meet information vendor requirements, we also need you to review and accept the ESA online.

Both the ESA and our website include important disclosures and regulatory information that are associated with our electronic content and services. When you click “I agree,” you will be consenting to electronic delivery of these items in HTML format. To access and retain them for your records, Schwab recommends the use of strong encryption, Secure Sockets Layer capable browsers with Java Script enabled. To learn more about browsers and internet security, please click on this link: [SiteWebSite/0](#). You may print the ESA before you click “I agree,” and you should retain a copy of your overall account agreement. If you do not have a printer, you may call us for a free paper copy of your account agreement including the ESA. The ESA will always be available for your review under the “Agreements” link found at the bottom of many pages of our website.

By clicking “I agree,” you will confirm your understanding, acceptance, and receipt of the ESA and its terms and conditions, and you will acknowledge and demonstrate that you can access the ESA and other HTML disclosures and regulatory materials on our Web site. This is required in order to access your account online. We will be creating an electronic record of your agreement. Thank you for your time and cooperation.

7 Review the two user agreements and click “Agree” for each to accept their terms.

Paperless Delivery (Step 1 of 2)

Get too much information in the mail already? We'll help by sending all of your Schwab brokerage trade confirmations via email and will notify you when your online statements and shareholder documents are ready.

Yes I would like to set up Paperless Delivery now.
 Please choose which documents you want to receive as paperless for each account.
 If there is no checkbox displayed, this account is either ineligible or already enrolled.

Enroll all eligible accounts

Account Number	Account Type	Nickname	Enroll in eConfirmations	Enroll in eStatements	Enroll in Shareholder Materials
1234-xxxx	Schwab One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9999-xxxx	Schwab One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹SchwabInstitutional.com accounts: To be eligible for reduced pricing by going paperless, you must enroll these accounts in both eConfirmations and eStatements.

Enter an email address to receive your paperless documents

Email Address:

I accept the terms and conditions for receiving paperless documents for my accounts now and in the future. Please check this box and click Submit below.
 I prefer to continue receiving my documentation from Schwab brokerage in the U.S. Mail.

(0009-7399)

8 Enroll in eDelivery for convenient, secure access to your account documents online. That way you can receive your trade confirmations, account statements and shareholder materials electronically, reducing paper clutter.

Select the accounts you wish to enroll in eDelivery, and choose the documents you'd like delivered electronically. Check the box next to “Enroll all eligible accounts”.

Enter the email address you will use to receive the documents. Then check the box to indicate your consent to receive paperless documents and click “Agree”. **Note: You will not be able to click “Agree” until you check the box.**