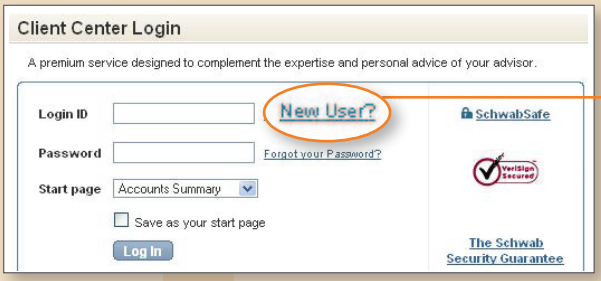
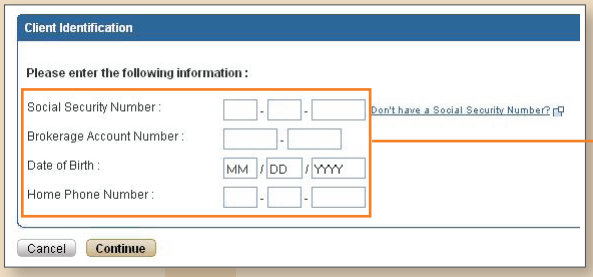
Setting Up Online Access to Your Schwab Accounts

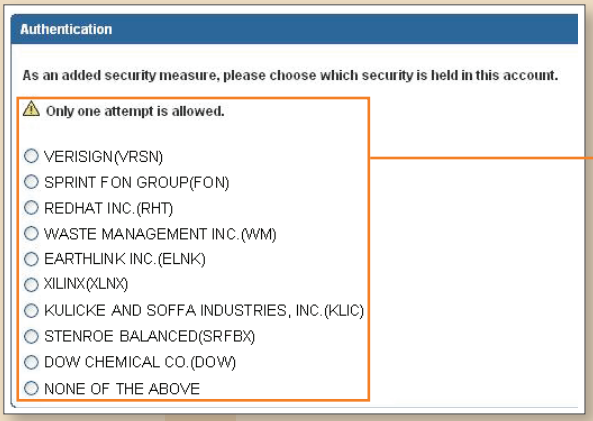
! Please have your most recent account statement from Schwab on hand. If your account is new and you haven't yet received a statement or you don't have one handy, please contact your advisor for assistance.



1 Go to schwaballiance.com and click the New User? link.

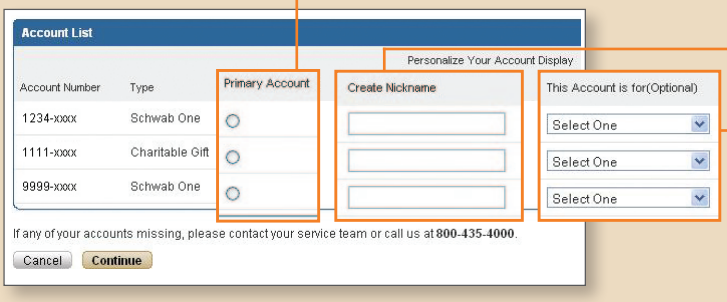


2 Enter the data requested. Your brokerage account number is the eight-digit number at the top of your account statement from Schwab. If you have more than one account, you can enter any one of those account numbers to create your login ID.



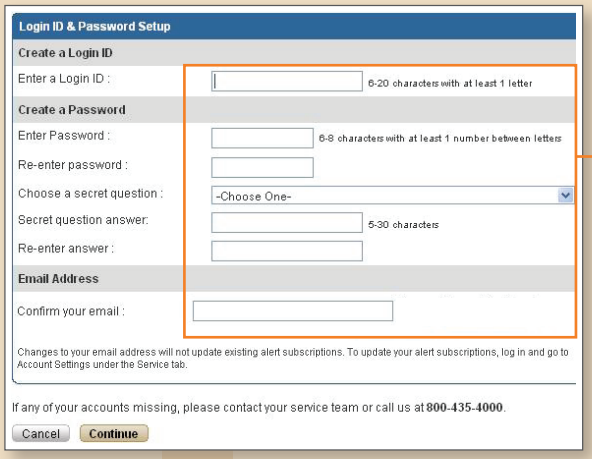
3 Refer to your account statement to confirm which of the securities listed is held in the account you identified on the previous screen. Click the radio button next to that security. If your account is new and your assets haven't transferred yet, select "NONE OF THE ABOVE".

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.

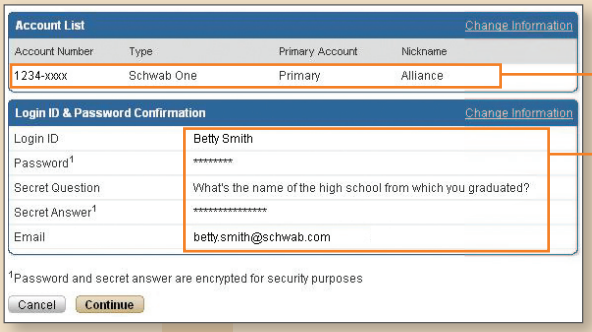


4 Use the radio buttons in the Primary Account column to select the account you'd like displayed when you log in.

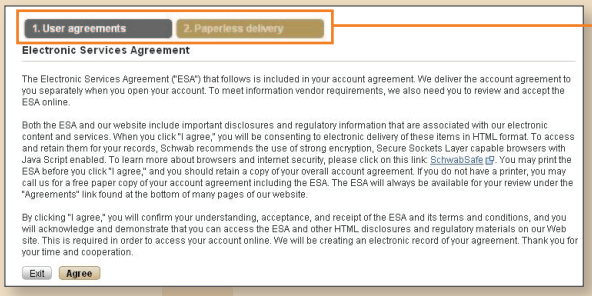
- In the Create Nickname column, enter the name you'd like to use to easily identify each account.
- Use the drop-down menu in the This Account is for (Optional) column to select the purpose of your account.



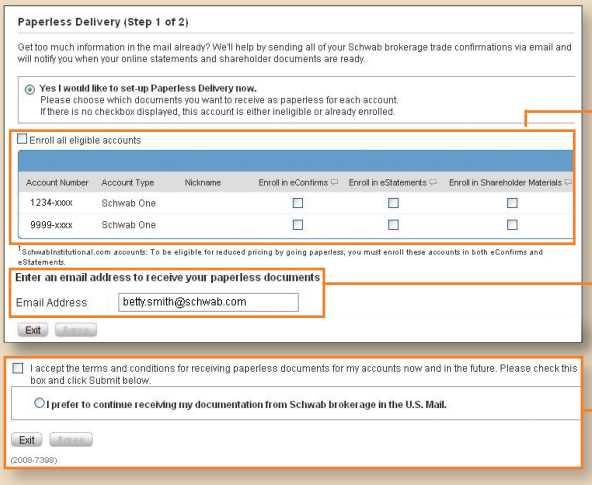
5 Fill in the fields. Your ID must be 6–20 characters long and contain at least one letter. Your password must be 6–8 characters and have at least one number in between letters. If you forget your ID or password, Schwab will ask for your secret question to verify your identity.



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



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



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.***

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