

## Full financial picture

Get a clear snapshot of your accounts on the **Accounts Summary** tab. Here you'll find major indices, balances including daily changes, and a summary of individual holdings. You can also perform a number of account-related tasks.

The screenshot shows the 'Accounts Summary' section of the Schwab website. It displays a table of brokerage accounts with columns for Value, Day Change, Activity, and Next Steps. The 'Day Change' column is highlighted with a blue circle and a callout pointing to the text 'View real-time day change at the account level.' Below the table, another section for Charles Schwab Bank is shown with columns for Deposits, Balance Owed, Details, and Next Steps. A callout points to the 'Details' column with the text 'Easy access to view detailed account information.' At the bottom, a note says 'Compare your holdings in an aggregate view of your Schwab accounts.'

Brokerage Accounts	Value	Day Change	Activity	Next Steps
2344-XXXX Active Trader	\$5,355.81	- \$15.53	No Activity	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
2653-XXXX Roth IRA	\$4,672.13	- \$176.55	No Activity	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
2653-XXXX Primary Brokerage	\$4,880.97	- \$22.54	<a href="#">1 Order</a>	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
3115-XXXX Managed	\$0.00	▲ \$0.00	No Activity	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
3177-XXXX Domestic Intl	-\$16.02	▲ \$0.00	No Activity	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
7935-XXXX Employee	\$10,583.08	- \$126.19	No Activity	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
7978-XXXX Alliance	\$8,882.36	- \$52.73	No Activity	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
8369-XXXX Individual	\$0.00	▲ \$0.00	No Activity	<a href="#">Balances</a>   <a href="#">Positions</a>   <a href="#">Transactions History</a>
<b>Totals</b>	<b>\$34,358.33</b>	<b>- \$393.54</b>		<a href="#">All Balances</a>   <a href="#">All Positions</a>

As of 07/24/08 03:56 PM EST

Charles Schwab Bank	Deposits	Balance Owed	Details	Next Steps
4400-00709369 <sup>1</sup>	Investor Checking	\$0.00	Pending Transactions: \$0.00 Available Funds: \$0.00	<a href="#">Balances</a>   <a href="#">History</a>
6400-00709012	Overdraft: OCL	Not Available	Not Available	<a href="#">Balances</a>

Compare your holdings in an aggregate view of your Schwab accounts.

## Frequently asked questions

### 1. How do I get a login ID and password for schwaballiance.com?

You have three options to obtain a login ID and password. Choose one of the following:

- Ask your investment advisor to initiate on your behalf.
- Call Schwab Signature Alliance at 800-515-2157.
- Register online at [www.schwaballiance.com](http://www.schwaballiance.com).

We recommend changing your password at least once every six months. For best practices on creating a login ID and password, go to [www.schwab.com/sa\\_protect](http://www.schwab.com/sa_protect).

### 2. Is there a fee for this service?

No. Schwab Signature Alliance is provided at no cost to clients of investment advisors working with Schwab Institutional®.

### 3. Can I still call my investment advisor for information now available on schwaballiance.com?

Yes. Schwab Signature Alliance services are designed to complement, rather than replace, the services you get from your investment advisor. You can call your investment advisor any time you want assistance with your financial plans and goals. Your account information will always be online for your convenience.

### 4. What support does the Schwab Signature Alliance phone team offer and when?

The dedicated team can help with general information and online support, such as issuing a login ID and temporary password or resetting a password. They are available Monday through Friday, from 8:30 a.m. to 7:00 p.m. ET.

### 5. How do I know that my personal account information and transactions are secure?

Schwab takes precautions to ensure that your personal account information and transactions are protected and accessed only by authorized individuals. For more information, go to [www.schwab.com/sa\\_protect](http://www.schwab.com/sa_protect).

### 6. How do I update my personal information?

To view and update your personal information, including mailing and email address, go to the Service Tab/My Profile.

### 7. I'm interested in receiving my account documents online only. How do I go paperless?

Once you have a schwaballiance.com login ID and password, go directly to the Paperless Enrollment page at [www.schwab.com/sa\\_gopaperless](http://www.schwab.com/sa_gopaperless).

### For more information

If you have questions, contact your investment advisor or call Schwab Signature Alliance at 800-515-2157.

# Schwab Signature Alliance®—a service designed to complement your relationship with your investment advisor.

Receive dedicated phone support plus secure online access to schwaballiance.com—a Web site designed exclusively for clients of independent investment advisors that custody at Schwab.

- Account history, positions and transactions
- A 10-year archive of account documents
- Portfolio performance with real-time balances
- Transfer and payment information
- Quotes and current market information

## Account information at your fingertips

It's easy to access account information on schwaballiance.com. You'll need to obtain a schwaballiance.com login ID and password. To get started, choose one of three options that is most convenient for you:

- Ask your investment advisor to initiate on your behalf.
- Call Schwab Signature Alliance® at 800-515-2157.
- Register online at schwab.com/sa\_webactivate.

Click to begin the registration process.

Once you obtain your login ID and password, you can select your start page from the drop-down menu. This will be the page displayed after you log in each time.

The screenshot shows the Schwab webactivate registration process. It starts with the Client Center Login screen, where users enter their Login ID and Password. A 'Start page' dropdown menu is highlighted, showing options like 'Account Summary'. Below this is the Login ID Setup screen, specifically the Authentication section. A 'Security Measure' dropdown menu is highlighted, listing options such as 'WASTE MANAGEMENT INC DEL (WM)', 'EARTHLINK INC (ELNK)', 'REDHAT INC (RHAT)', 'XILINX INC (XLNX)', 'LONGLEAF PARTNERS INTERN (LLNX)', 'ROYAL DUTCH 1.25 GULDEN (RD)', 'DOW CHEMICAL COMPANY (DOW)', 'EMERSON ELECTRIC CO (EMR)', 'VERISIGN INC (VRSN)', and 'NONE OF THE ABOVE'. At the bottom of the setup screen, there are 'Cancel' and 'Continue' buttons.

You will need a copy of a recent statement on hand, as our secure online registration process requires some account-specific details.

## Instant access to your account information

The **Account** tab features the details investors look for most often, including a 10-year archive of account statements, trade confirmations and tax reports.

This screenshot shows the Schwab Account tab. It displays real-time balances, positions, performance, and history. A 'Margin Details' section is shown with 'Funds Available' and 'To Trade' options. The 'History' section shows a transaction for 'Joint Tenant 3086-XXXX' with a quantity of 340.00 Shares and a status of OPEN. The 'Statements & Reports' section provides access to a 10-year archive of account statements, trade confirmations, and tax reports. A blue box highlights the 'Statements & Reports' section with the text 'Access a 10-year archive of account statements, trade confirmations and tax reports.'

Download data into third-party software.

Get real-time balances, positions, performance and account history details.

Access a 10-year archive of account statements, trade confirmations and tax reports.

## Trade order status and market information

The **Trade** tab provides access to the order status of trades your investment advisor has placed on your behalf. Although you also have the ability to place trades from this tab, please consult your investment advisor before using this feature. The **Research** tab provides market, equity and industry information and research from respected sources.

This screenshot shows the Schwab Trade tab. It displays order status and market information. The 'Order Status' section shows a message to consult with an investment advisor before changing pending orders. The 'Markets' section displays breaking news and market data, including a chart for the Dow Jones Industrial Average (NDX) showing a recent dip. A blue box highlights the 'Markets' section with the text 'View real-time stock quotes and market research.'

Contact your investment advisor.

View real-time stock quotes and market research.