

Memorandum

Obtaining online access your Schwab account:

Call Schwab Signature Services Alliance – customer service for clients of advisors. 800-515-2157, option 2. Signature Services will walk the client through setting up online account access. The client must call Signature Services in order to get the initial online password.

With the password from Schwab the client can go online to the following site:
www.schwaballiance.com

Click: *log in*

Type in Account # / Log in ID: *client social security number*

Type in Password: *initial password given by Schwab Signature Services*

Create a new password by typing in the initial password and the new password.

On all legal disclosures click: *agree*

To get access to all accounts, Schwab Signature Services must add each one to online access. The client must call Signature Services Alliance to do this. Once the accounts are added the client can view each by using the “Select Account” pull-down menu.

Power of Attorney (POA) is needed for access to other people’s accounts (e.g. spouse). This POA can be found under the Service/Forms tabs. It should be signed by the client and the other party and sent to the following address:

Charles Schwab & Co.
P.O. Box 628290
Orlando, FL 32862

It will take 3-4 days for the other person’s account to become accessible to the client. Joint accounts will automatically be accessible.

The client can customize the look of the “Overview” screen by clicking Customize. Using the account pull-down menu (Overview/Balances/Positions) the client can “Create/Edit Groups.”

This function allows the client to re-name accounts and to group them together (e.g. all retirement accounts) for viewing.

Balances screen allows the client to view each account balance or the total balance of all accounts using the “All Accounts” option.

Schwab can send a position and account balance summary e-mail to the client daily. Schwab can also send these reports weekly, monthly, quarterly, or yearly. Client simply needs to call Signature Services and request that this be done.