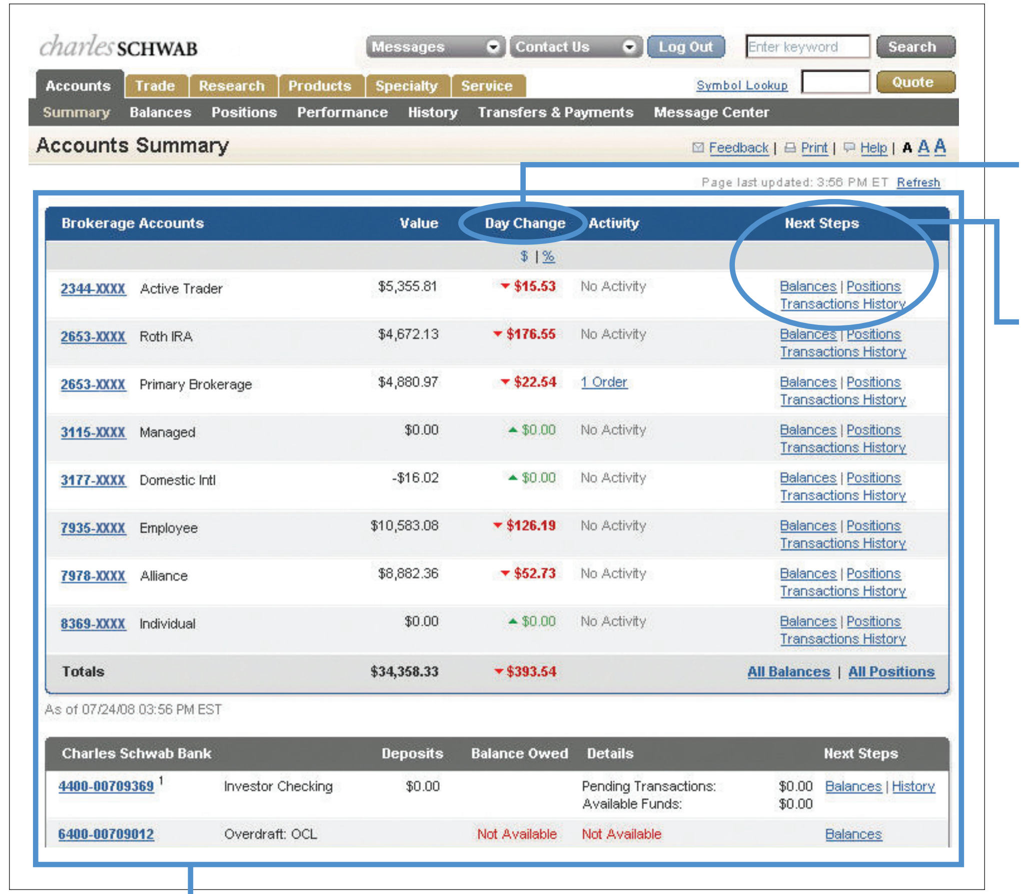
Full financial picture

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.



View real-time day change at the account level.

Easy access to view detailed account information.

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.

   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.

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.

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.

For more information

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

Schwab Institutional is a division of Schwab. (0908-1147) MKT39677-02 (09/08)

charles SCHWAB
INSTITUTIONAL

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**

charles SCHWAB
INSTITUTIONAL

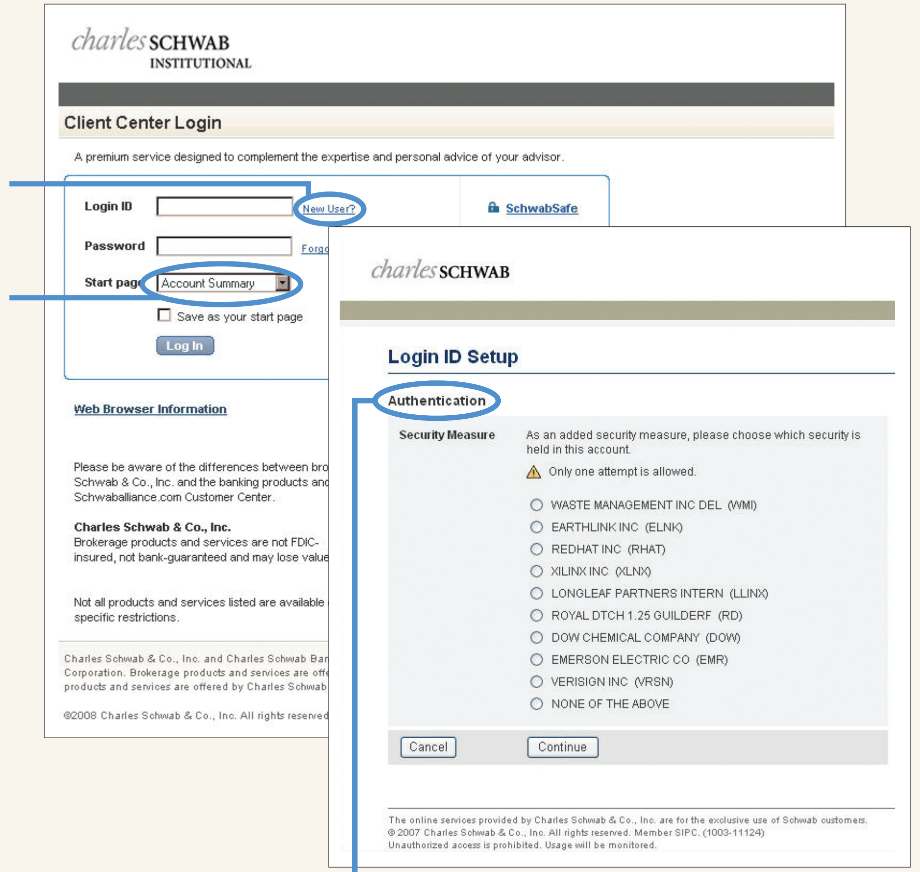
Account information at your fingertips

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.

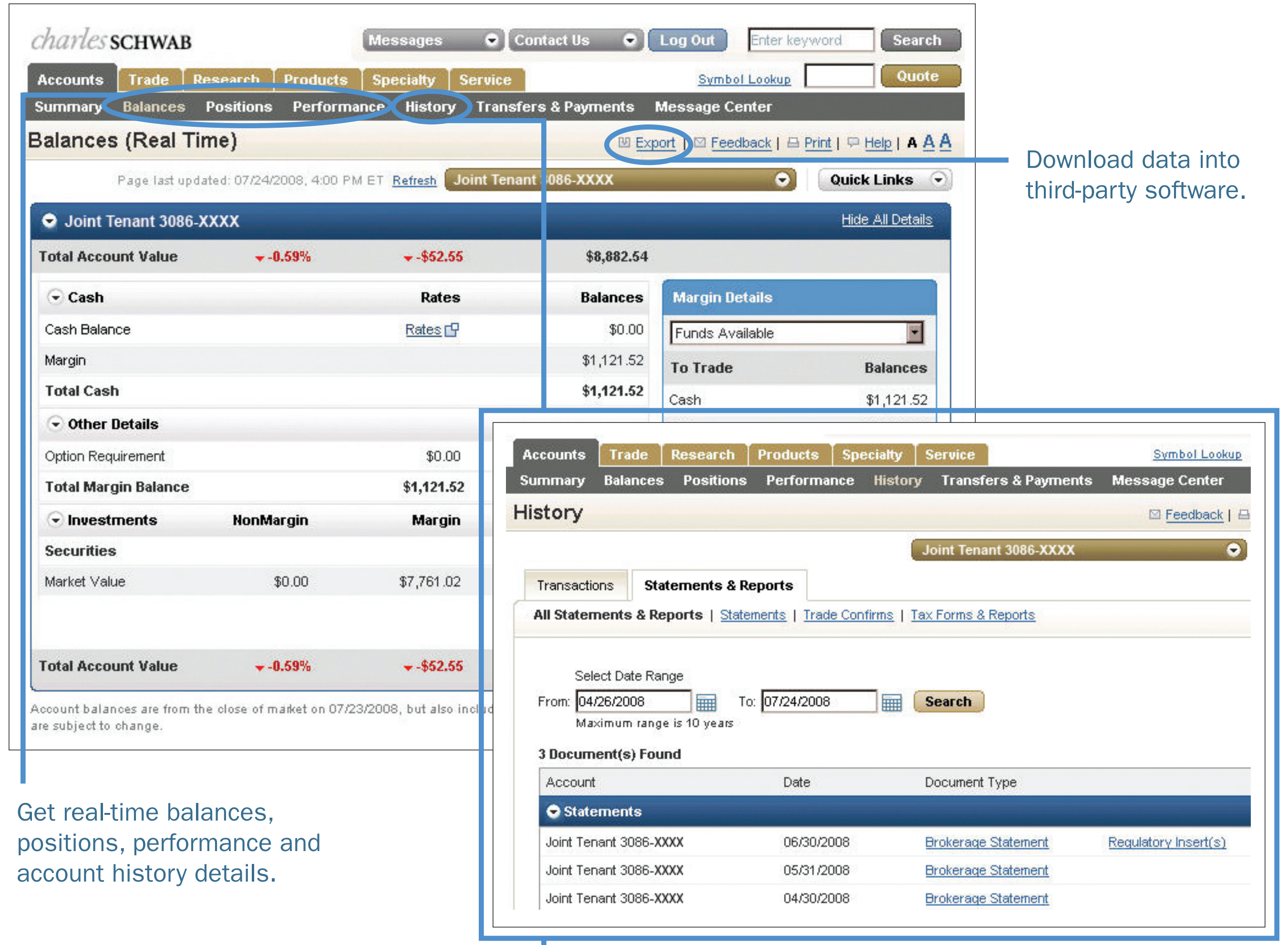
Once you obtain your login ID and password, you can select your start page from the drop-down menu. This will be the page displayed after you log in each time.



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.



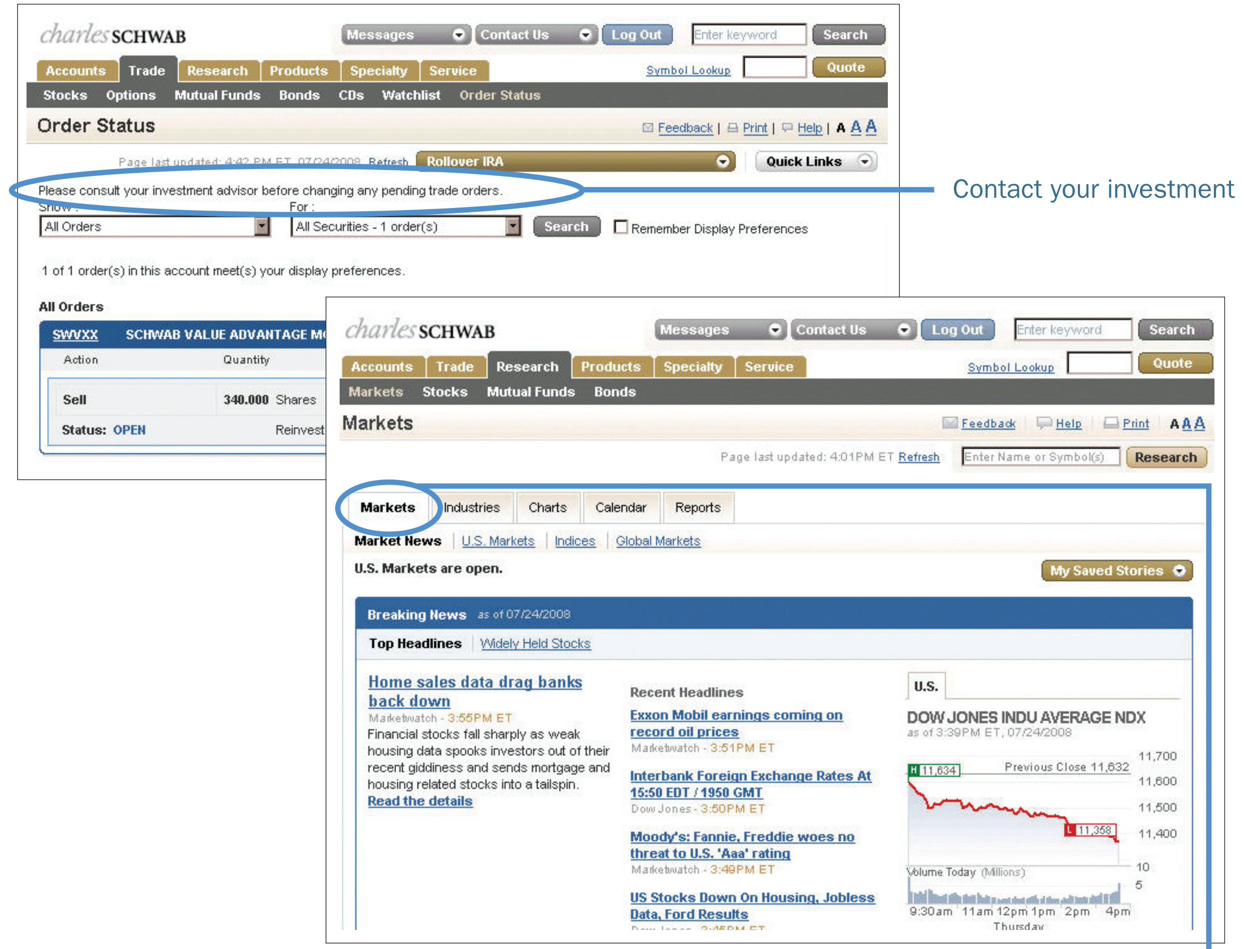
Download data into third-party software.

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.



Contact your investment advisor.

View real-time stock quotes and market research.