

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.

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

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

Charles Schwab Bank	Deposits	Balance Owed	Details	Next Steps
4400-00709369 ¹ Investor Checking	\$0.00		Pending Transactions: \$0.00 Available Funds: \$0.00	Balances History
6400-00709012 Overdraft: OCL		Not Available	Not Available	Balances

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 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 registration process consists of two main steps. The first is the 'Client Center Login' page, which includes a 'New User?' link, a 'SchwabSafe' security icon, and fields for 'Login ID' and 'Password'. A 'Start page' dropdown menu is also present, with 'Account Summary' selected. The second step is the 'Login ID Setup' page, which features an 'Authentication' section with a 'Security Measure' warning and several radio button options for selecting a security measure.

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.

The account dashboard provides real-time information. The 'Balances (Real Time)' page shows account details for 'Joint Tenant 3086-XXXX', including a total account value of \$8,882.54 and a total margin balance of \$1,121.52. An 'Export' button is highlighted with a blue circle and a callout: 'Download data into third-party software.' The 'History' page allows users to view a 10-year archive of statements and reports, with a date range selector set from 04/26/2008 to 07/24/2008. A list of 3 documents is shown, including brokerage statements and regulatory inserts.

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.

The trade and market information pages provide comprehensive data. The 'Order Status' page shows a pending order for 'SWXXX SCHWAB VALUE ADVANTAGE M' with a quantity of 340,000 shares. A warning states: 'Please consult your investment advisor before changing any pending trade orders.' The 'Markets' page features a 'Breaking News' section with headlines such as 'Home sales data drag banks back down' and 'Exxon Mobil earnings coming on record oil prices'. It also includes a 'DOW JONES INDU AVERAGE NDX' chart showing a decline from 11,632 to 11,350.

Contact your investment advisor.

View real-time stock quotes and market research.