

Schwab Alliance

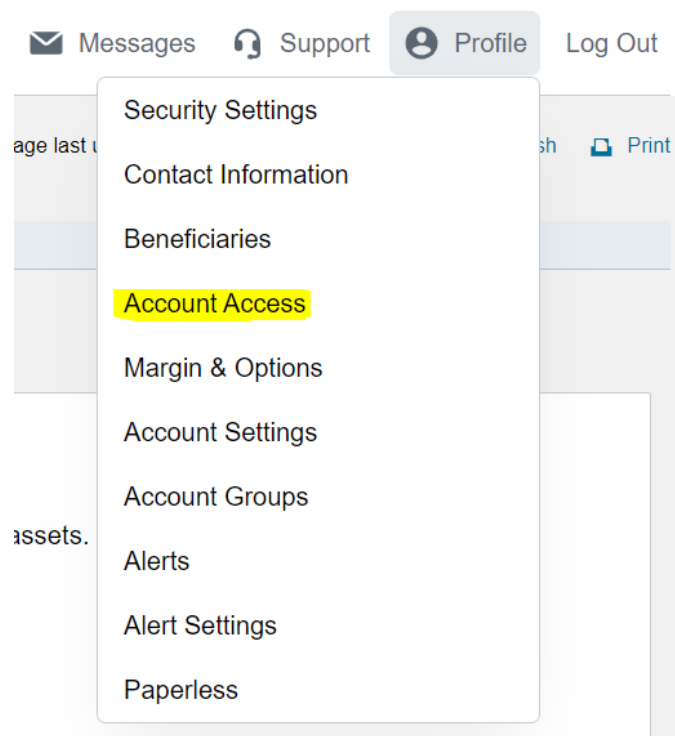
How to Add an Authorized Viewer (i.e. Granting View-Only Access)

Guide Summary

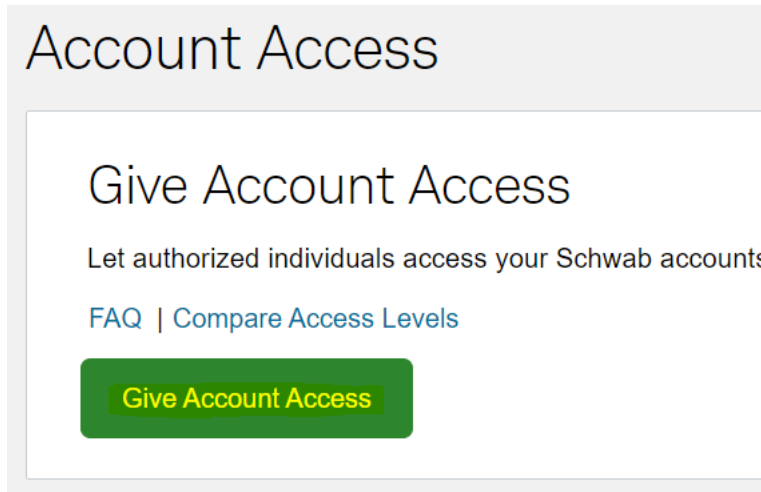
View-only access allows you to share a read-only Schwab Alliance experience with an authorized user, such as a spouse or family member.

Steps to Add an Authorized Viewer on Schwab Alliance

1. Login to Schwab Alliance at: <http://SchwabAlliance.com/>
2. Click Profile in the top navigation bar and select 'Account Access'

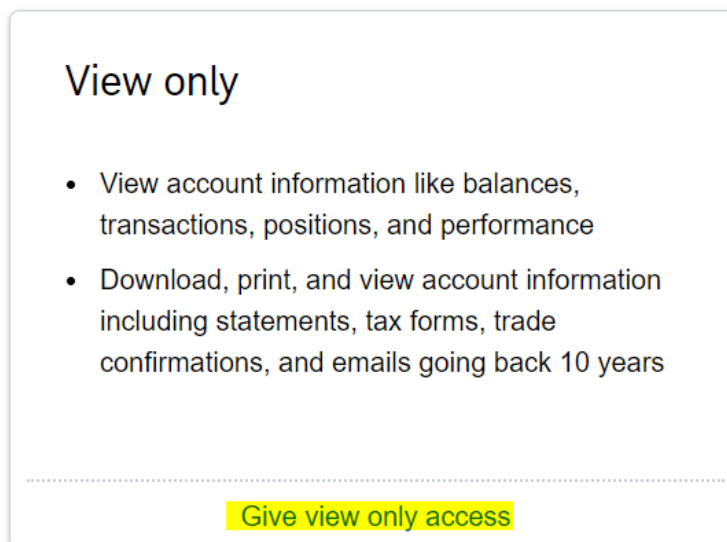


3. Click the green button that says 'Give Account Access'



The screenshot shows a web interface for 'Account Access'. At the top, there is a grey header with the text 'Account Access'. Below this, the main content area has a white background with a light grey border. It features the heading 'Give Account Access' in a large, dark font. Underneath the heading is the text 'Let authorized individuals access your Schwab accounts'. Below that, there are two links: 'FAQ' and 'Compare Access Levels', separated by a vertical bar. At the bottom of this section is a prominent green button with the text 'Give Account Access' in white.

4. Click on 'View only'



The screenshot displays the 'View only' access level details. It has a white background with a light grey border. The heading 'View only' is at the top left. Below it is a bulleted list with two items: 'View account information like balances, transactions, positions, and performance' and 'Download, print, and view account information including statements, tax forms, trade confirmations, and emails going back 10 years'. At the bottom of the box, separated by a horizontal dashed line, is a yellow button with the text 'Give view only access' in black.

5. Select the account you'd like to provide access to

Give Account Access

Which Account Do You Want Them to Access?

Select the account you want to give them view only access to.

- Contributory**
 - Bill Bucks
Individual
 - Nancy Nickel
Limited Power Financial Advisor
 - Nancy Nickel
Withdrawal Power Financial Advisor
- Designated Bene Individual**
 - Bill Bucks
Individual
 - Nancy Nickel
Limited Power Financial Advisor
 - Nancy Nickel
Withdrawal Power Financial Advisor

[Don't see your account?](#) [Cancel](#) [Back](#) [Continue](#)

6. Enter the name, phone number, and email address of the person you are giving access to

Give Account Access

Who Would You Like to Give Access to?

i We are unable to support adding agents who are not US residents in our digital flow. To add an agent who is not a US resident please use the paper form.

Please tell us a few details about the person you're giving view only access to. Make sure the information is current and ...

Full Name

First name Last name

Contact Details

By providing this information, you acknowledge that you have their permission to share this information with us for this purpose.

Phone number

Email Confirm email

[Cancel](#) [Back](#) [Continue](#)

7. Verify that the information is correct and click Continue

Give Account Access

Did We Get it Right?

You are requesting to grant test view only access to your account ending in xxx. Please verify we got test's information right. You can make edits if needed before we finish up.

Your request:

Full name [Edit](#)
Bill Bucks

Contact details [Edit](#)
234-567-8901
bill.bucks@email.com

[Cancel](#) [Back](#) [Continue](#)

8. Review and mark both checkboxes and click Agree & Submit

Give Account Access

+ Electronic signature consent for authorized viewer

+ Authorized viewer's authorization agreement


Cancel

Back

Agree & Submit

9. This person must now follow the instructions in their inbox link to complete the process.

Give Account Access

 We have received your request to give **Bill** access.

Next Steps

We just sent **Bill** an invitation to get View Only access to your account ending in XXX. The invitation expires 7 days from today. Once **Bill** does enroll, we'll notify you.

Got it