Schwab Alliance

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

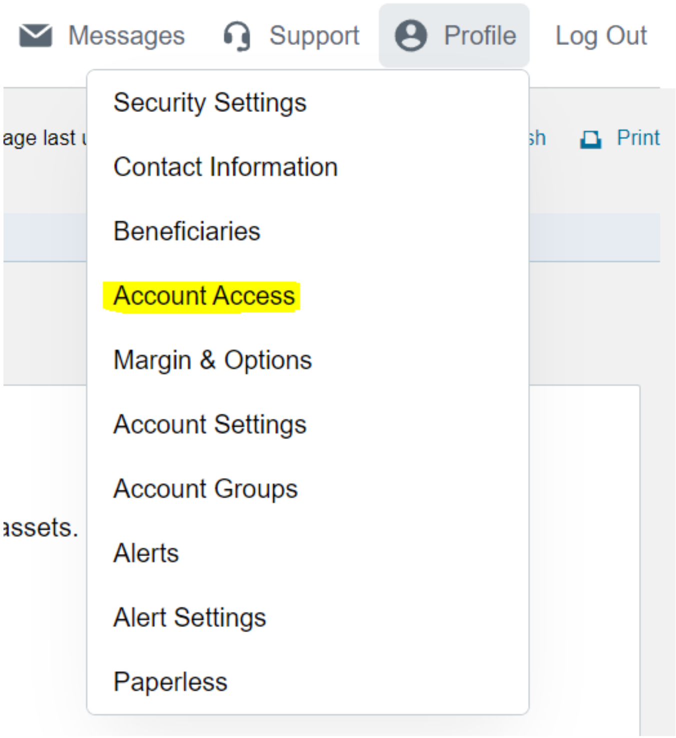
Guide Summary

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

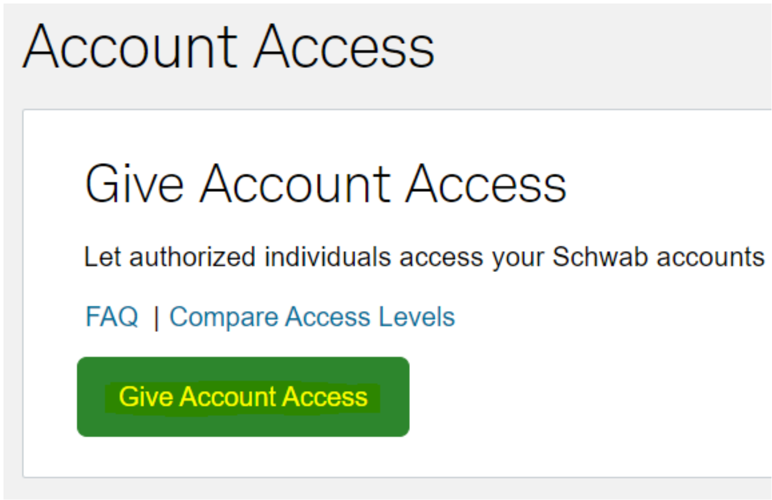
Steps to Add an Authorized Viewer on Schwab Alliance

1. Login to Schwab Alliance at: http://SchwabAlliance.com/

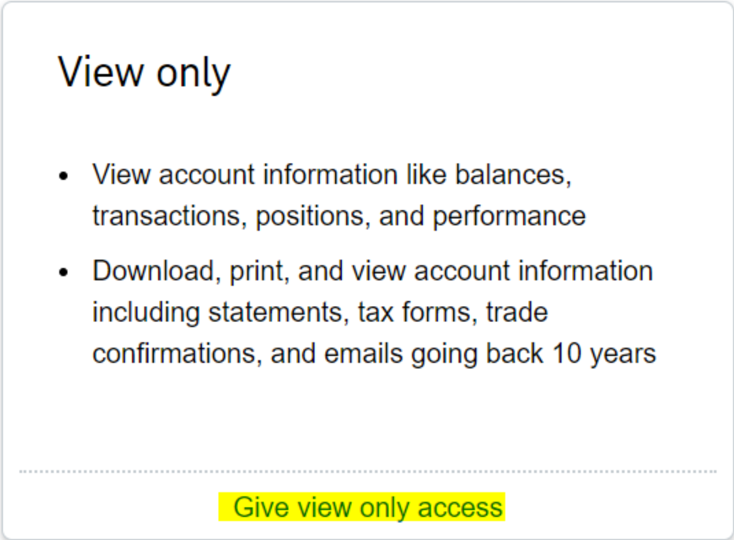
2. Click Profile in the top navigation bar and select 'Account Access'



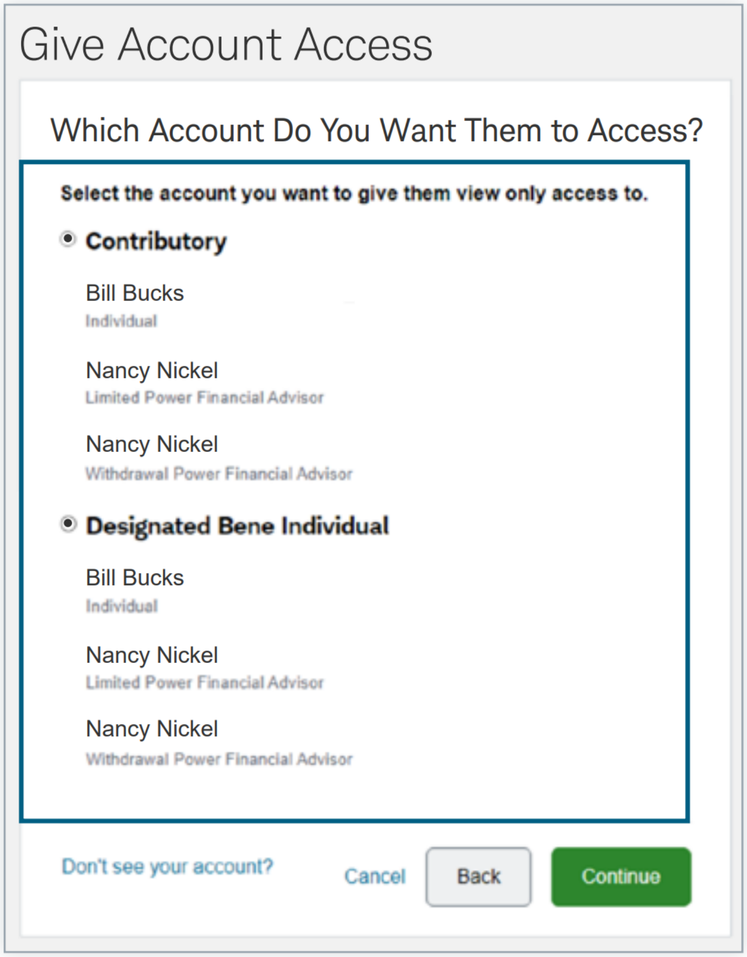
3. Click the green button that says ‘Give Account Access’



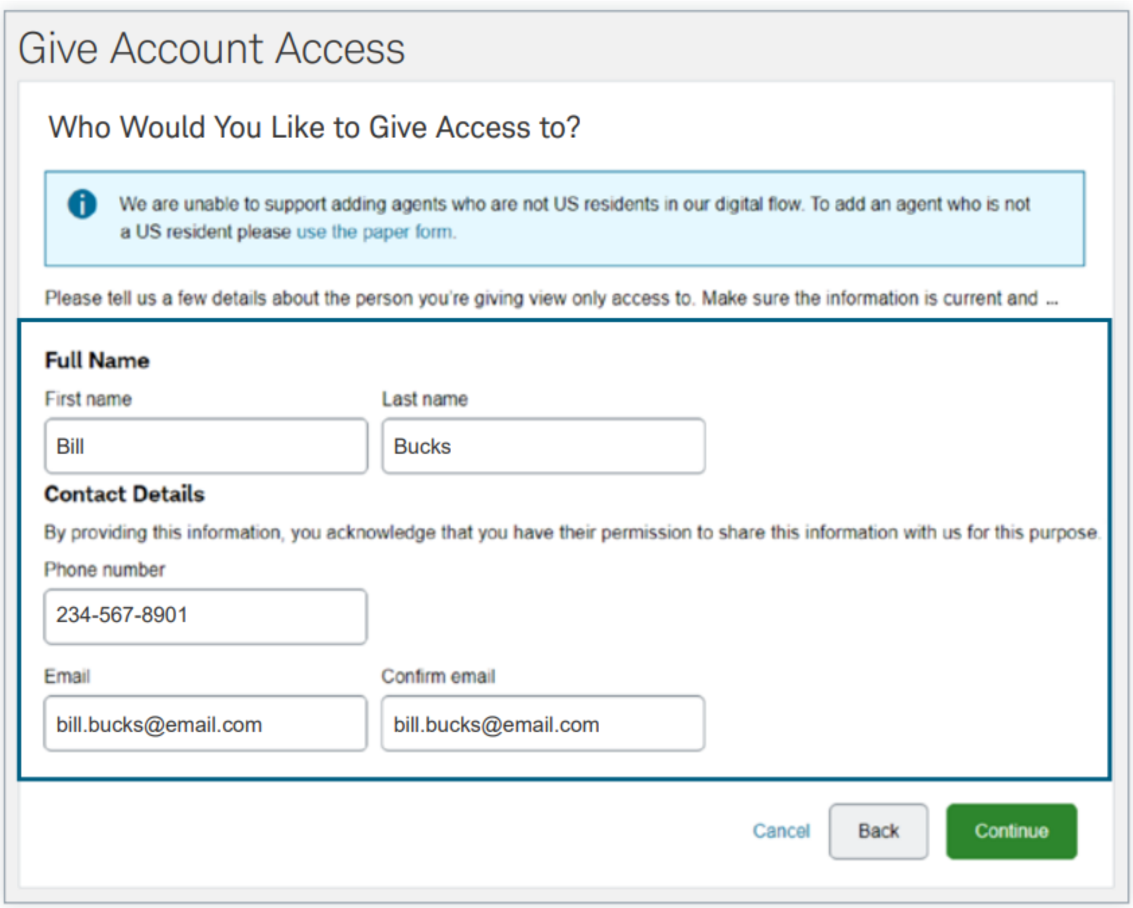
4. Click on ‘View only’



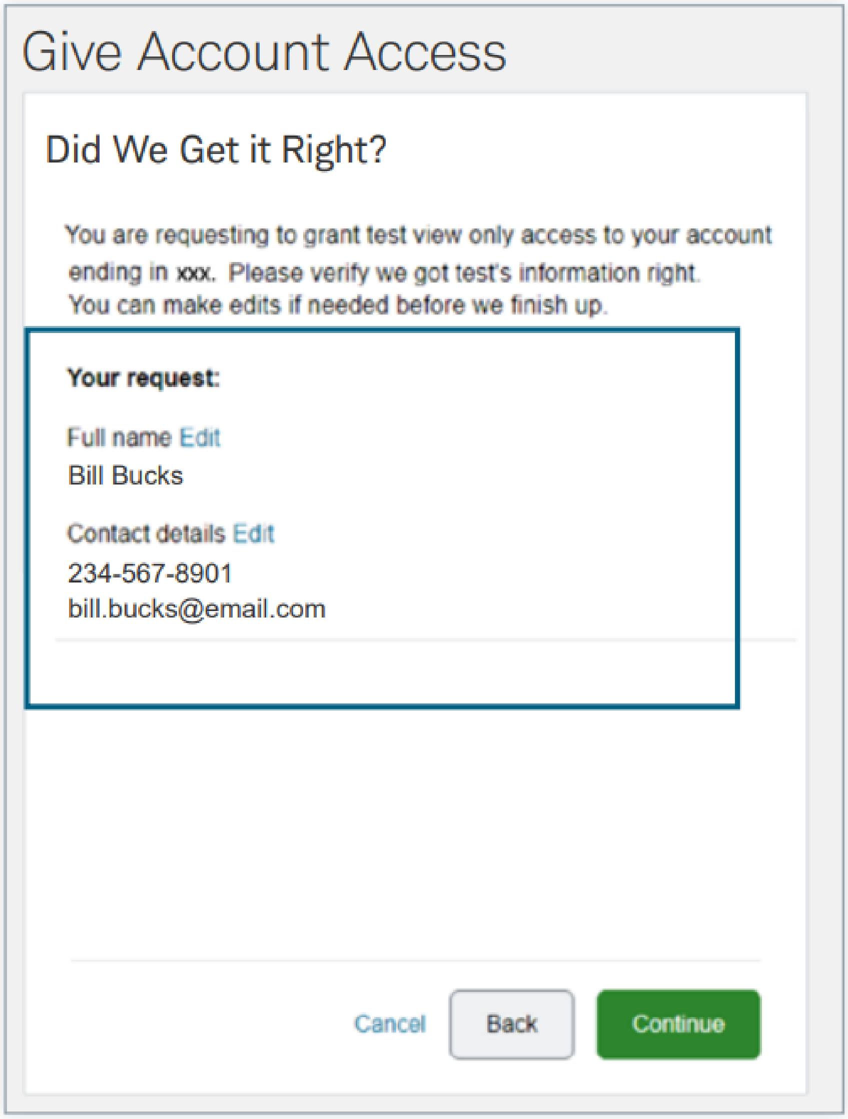
5. Select the account you'd like to provide access to



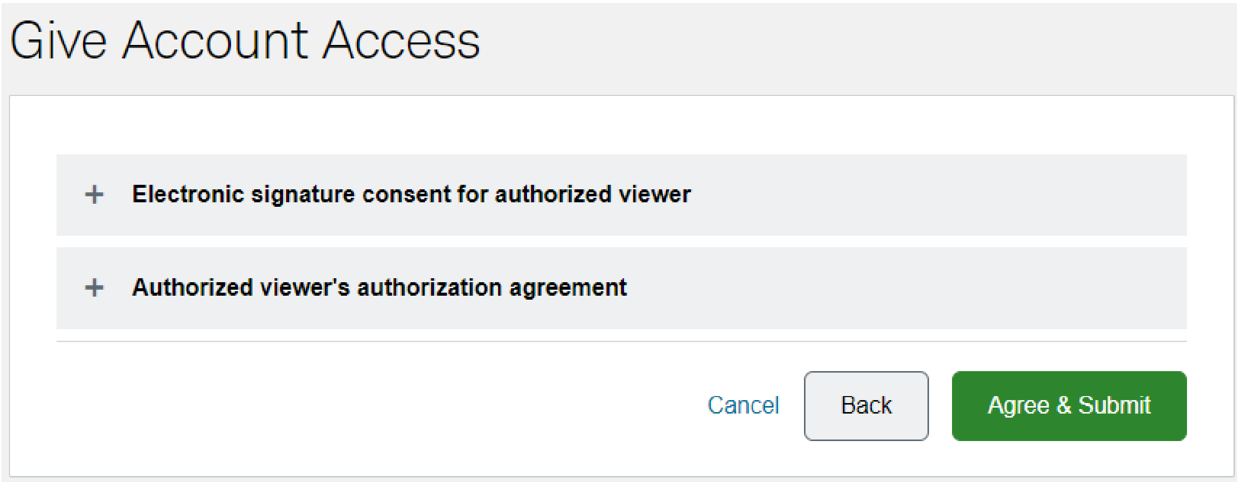
6. Enter the name, phone number, and email address of the person you are giving access to



7. Verify that the information is correct and click Continue



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



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