Electronic delivery provides fast, secure access to account documents

Electronic delivery of your account documents, such as statements and trade confirmations, is available via schwaballiance.com, the Schwab Institutional® Web site designed exclusively for clients of investment advisors.

Go paperless and you’ll benefit from:
- Increased level of security
- Convenient access
- Faster delivery
- Potential lower electronic equity trade commissions
Your documents are safer with electronic delivery

At Schwab, we are committed to protecting your privacy. Electronic delivery of your account documents on our secure Web site is safer and faster than traditional mail delivery. Schwab uses Secure Sockets Layer (SSL) encryption technology, a secure communication protocol designed to reduce the chance of anyone intercepting or viewing your personal information. You will need a schwaballiance.com Login ID and password to enroll in electronic delivery and turn off paper.

It’s simple to sign up

Do you have an active schwaballiance.com Login ID and password?

If yes:
Go directly to our Paperless Enrollment Page at www.schwab.com/sa_gopaperless.

If no:
You have three options to obtain a Login ID and password. Select the option below that is most convenient for you.

• Ask your investment advisor to initiate on your behalf.
• Register online at www.schwab.com/sa_webactivate.
• Call Schwab Signature Alliance® at 800-515-2157.

Once you obtain your Login ID and password, go to www.schwab.com/sa_gopaperless to complete enrollment.
Three easy steps to enroll

It’s simple to sign up or update your information for electronic delivery services, including eConfirms, eStatements and Shareholder Materials, such as prospectuses and proxy materials.

Step 1: Select all accounts to enroll with one click.

Step 2: Easily edit or add an email address.

Step 3: Consent to receive electronic documents and submit your enrollment.
Easily access your documents online

Once you have completed your paperless enrollment, you can search and view up to 10 years of account documents on the eDocuments page, located under the Account tab.

eDocuments Page on www.schwaballiance.com

Select the account document(s) and search your personal archives.

Click to view documents.
View your documents

View your documents online just as you would view the paper versions. When you click on the document from the eDocuments page, it will display as a PDF of the paper version.

Sample eConfirm

Sample eStatement
Frequently asked questions

1. How soon after I enroll in electronic delivery will the changes take effect?
   When you enroll at www.schwab.com/sa_gopaperless, the changes will take effect by the
   next business day.

2. How will I know when my statements and trade confirmations are available?
   You’ll receive a notification email from Schwab when your electronic statement is available,
   typically by the fifth business day of the month. Trade confirmations are generally available within
   24 hours of trade execution.

3. Are electronic statements different than my paper statements?
   Electronic statements are PDF versions of the paper statement, so you’ll see the same information
   online that’s in your paper statements.

4. Are historical documents available?
   Yes, you’ll have access to ten years of your account statements and trade confirmations and nine
   years of tax reports.

5. How do I save electronic documents to my computer?
   Click on the Save icon from the Adobe Acrobat tool bar. If the Save icon is not displayed, select
   “Save” or “Save As” from your browser’s File menu.

6. Am I eligible to receive lower equity trade commission pricing tied to electronic
   delivery of account documents?
   You may qualify for lower commission pricing on electronic equity trades when you enroll in both
   electronic trade confirmations (eConfirms) and electronic statements (eStatements). Contact your
   investment advisor to determine your eligibility.

7. Can I go back to paper delivery?
   Yes, you can resume paper delivery at any time by logging on to www.schwaballiance.com, calling
   your investment advisor or calling Schwab Signature Alliance® at 800-515-2157. Please be aware
   that resuming paper delivery may affect your eligibility for lower equity trade commission pricing.

For more information

If you have questions about enrolling in electronic delivery, talk to your investment advisor or call
Schwab Signature Alliance at 800-515-2157.