Establishing Charles Schwab Online Account Access via TD Ameritrade AdvisorClient
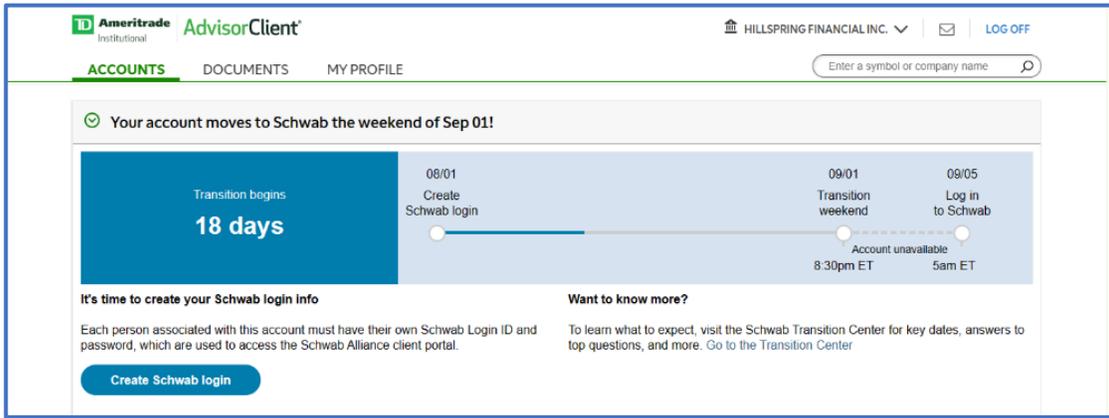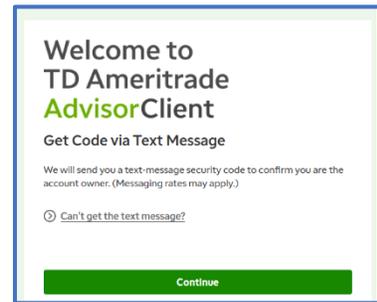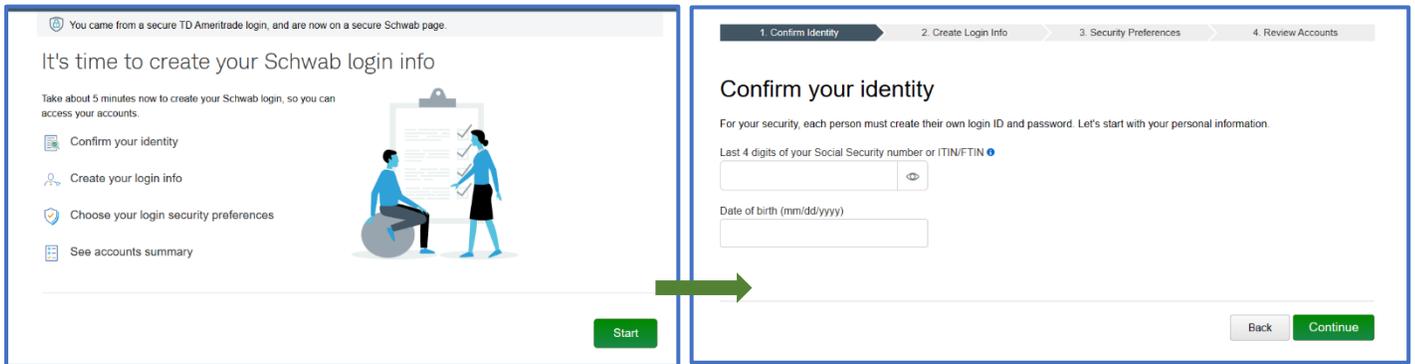
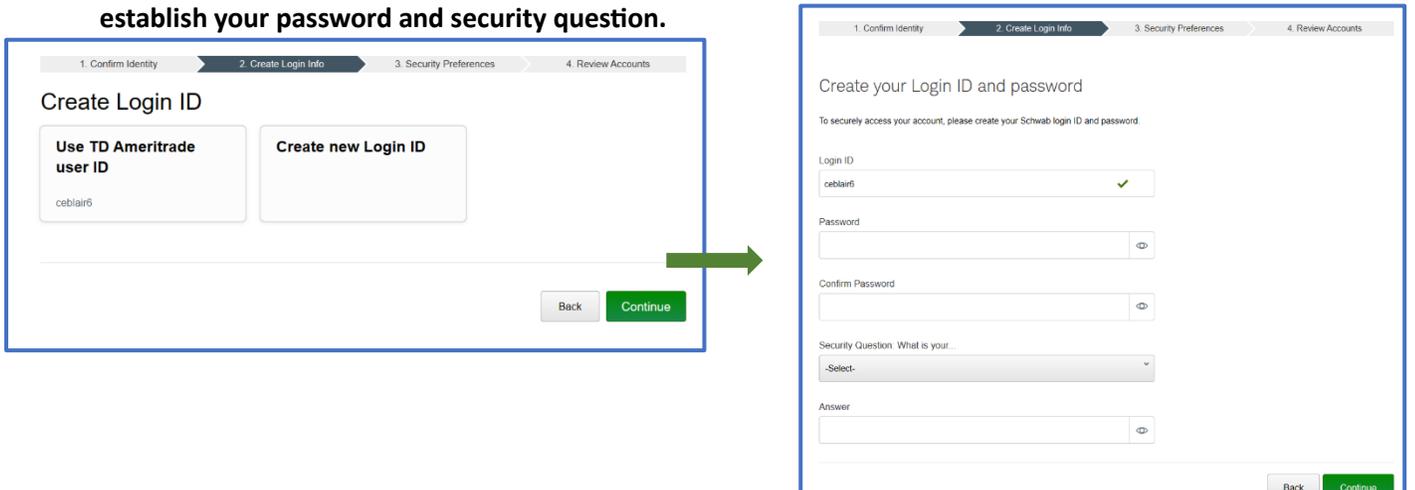1. **Login to TD Ameritrade AdvisorClient and select Create Schwab login**

2. **Select Continue to receive a code via text message to the phone number on file with TD Ameritrade or select Can't get the text message? for more options.**

3. **A new window for the Schwab Alliance client site will open, select Start and follow the prompts to confirm your identity.**
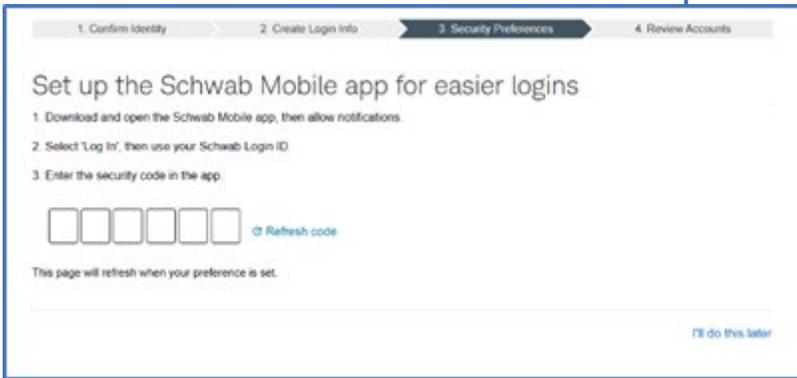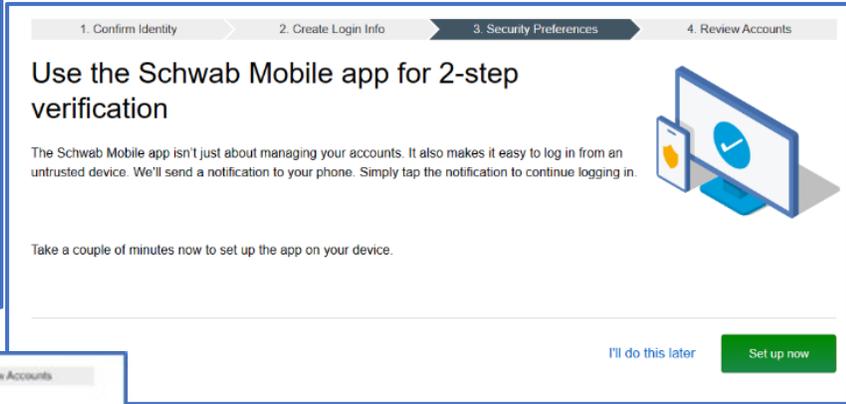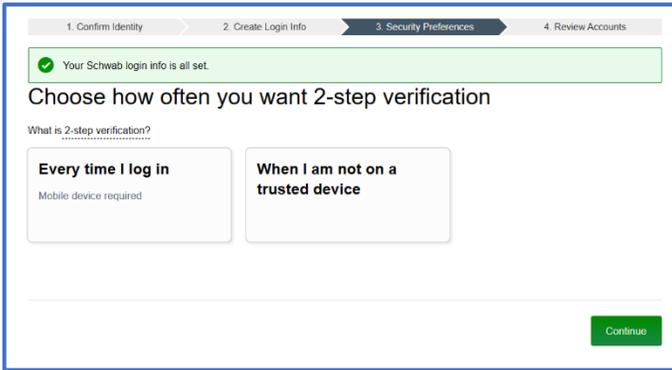

4. **Continue to elect whether to transfer your TD Ameritrade user ID or create a new Login ID; then establish your password and security question.**
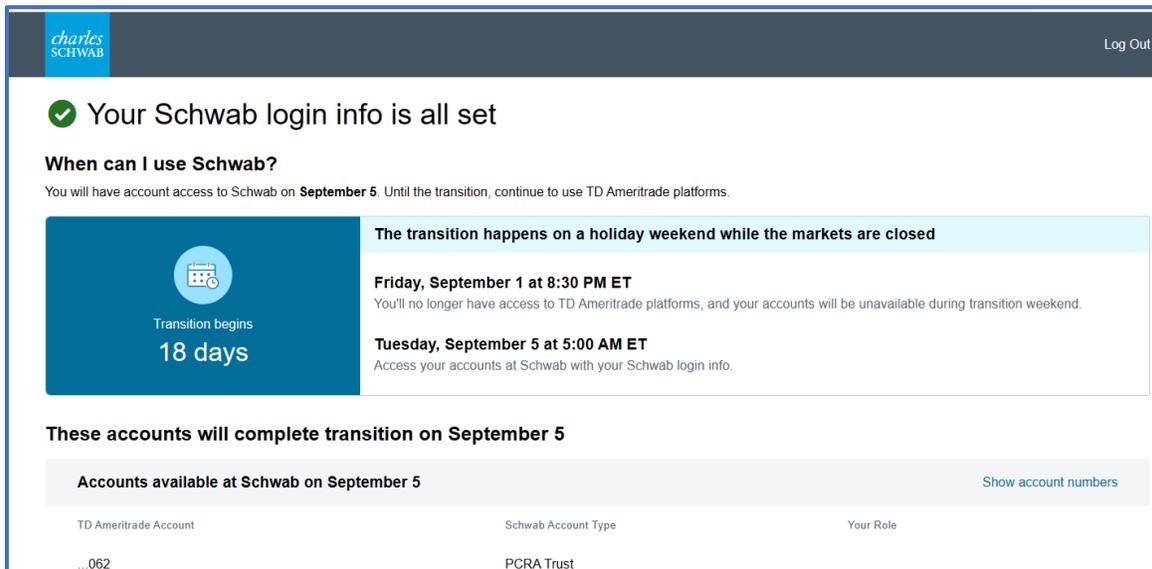
5. Choose frequency of 2-step verification and elect whether to set up the Schwab Mobile app.

It is recommended that you download the mobile app for easier account access and secure biometric login.

6. Review your account list but be advised that full access will not be available until September 5, 2023.

For additional assistance with online account access, please contact:

TD Ameritrade Technology	**Charles Schwab Alliance**
800.431.3500, opt. 3	800.780.2755