## **Establishing Charles Schwab Online Account Access via TD Ameritrade AdvisorClient**

1. Login to TD Ameritrade AdvisorClient and select Create Schwab login

Institutional	<u> </u>		
ACCOUNTS DOCUMENTS MY PROFILE		Enter a symbol	or company name
$\odot$ Your account moves to Schwab the weekend	Sep 01!		
	11	09/01	09/05
Transition begins Sch	ite	Transition	Log in to Schwab
18 days		O	
		Account ur 8:30pm ET	5am ET
It's time to create your Schwab login info	Want to know more?		
Each person associated with this account must have their own S password, which are used to access the Schwab Alliance client	To learn what to expect, visit the stop questions, and more. Go to th	Schwab Transition Center for e Transition Center	key dates, answers to
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.

You came from a secure TD Ameritrade login, and are now on a secure Schwab page.	1. Confirm Identity     2. Create Login Info     3. Security Preferences     4. Review Accounts
It's time to create your Schwab login info	
Take about 5 minutes now to create your Schwab login, so you can access your accounts.         Image: Confirm your identity         Create your login info         Choose your login security preferences         See accounts summary	Confirm your identity For your security, each person must create their own login ID and password. Let's start with your personal information. Last 4 digits of your Social Security number or ITIN/FTIN  Date of birth (mm/ddlyyyy)
Start	Back Continue

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.

1. Confirm Identity	2. Create Login Info 3. Security Preferences	4. Review Accounts
Create Login ID		
Use TD Ameritrade user ID	Create new Login ID	
ceblair6		
		Back Continue

To securely acces	s your account, please o	reate your Schwab login IE	) and password.	
Login ID				
ceblair6			~	
Password				
			Φ	
Confirm Passwo	rd			
			θ	
Security Questio	n: What is your			
-Select-	n. winacis your		~	
Answer				

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5. Choose frequency of 2-step verification and elect whether to set up the Schwab Mobile app.

1. Confirm Identity     2. Create Login Info     3. Security Preferences     4	It is recommended that you download the mobile app for easier account access and secure biometric login.
Vour Schwab login info is all set.	
Choose how often you want 2-step verification	1. Confirm Identity       2. Create Login Info       3. Security Preferences       4. Review Accounts         Use the Schwab Mobile app for 2-step
Every time I log in Mobile device required When I am not on a trusted device	verification The Schwab Mobile app isn't just about managing your accounts. It also makes it easy to log in from an untrusted device. We'll send a notification to your phone. Simply tap the notification to continue logging in.
1. Confirm Identity 2. Create Login Info 3. Security Preferences	Continue Take a couple of minutes now to set up the app on your device. I'll do this later Set up now
Set up the Schwab Mobile app for easier logi	IS
2. Select Log In', then use your Schwab Login ID.	
3. Enter the security code in the app	
C Refesh code	
This page will refresh when your preference is set.	
	Til do this later

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

<i>charles</i> schwab		Log Out			
🕑 Your Schwab log	Your Schwab login info is all set				
When can I use Schwab? You will have account access to Schwab on	When can I use Schwab? You will have account access to Schwab on September 5. Until the transition, continue to use TD Ameritrade platforms.				
	The transition happens on a holiday weekend w	hile the markets are closed			
Transition begins 18 days	Friday, September 1 at 8:30 PM ET You'll no longer have access to TD Ameritrade platforms, and your accounts will be unavailable during transition weekend. Tuesday, September 5 at 5:00 AM ET Access your accounts at Schwab with your Schwab login info.				
These accounts will compl	These accounts will complete transition on September 5				
Accounts available at Schwal	o on September 5	Show account numbers			
TD Ameritrade Account	Schwab Account Type	Your Role			
062	PCRA Trust				

For additional assistance with online account access, please contact:**TD Ameritrade TechnologyCharles Schwab Alliance**800.431.3500, opt. 3800.780.2755