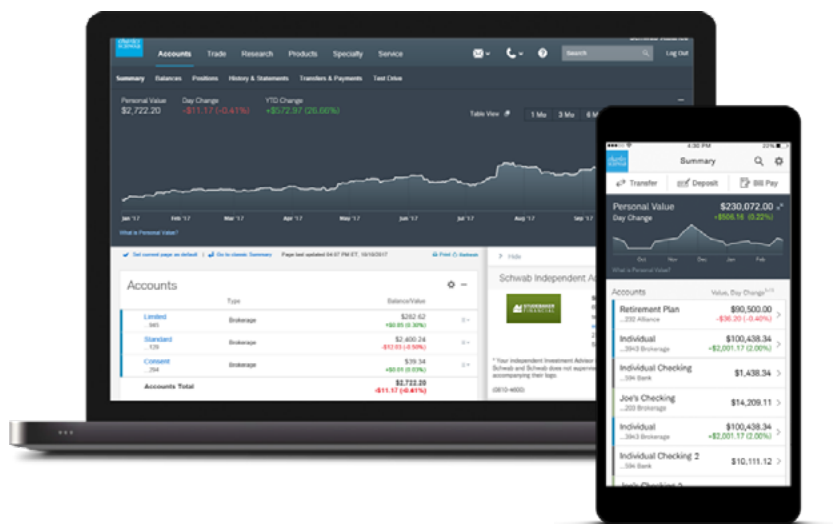


## Schwab Account Access for TCG Advisors Clients

Signing up gives you access to your account information virtually anytime, anywhere, while saving time and paperwork.

Designed for investors like you, our website and mobile app enable you to stay informed about your accounts while still relying on the one-on-one guidance provided by your independent advisor.

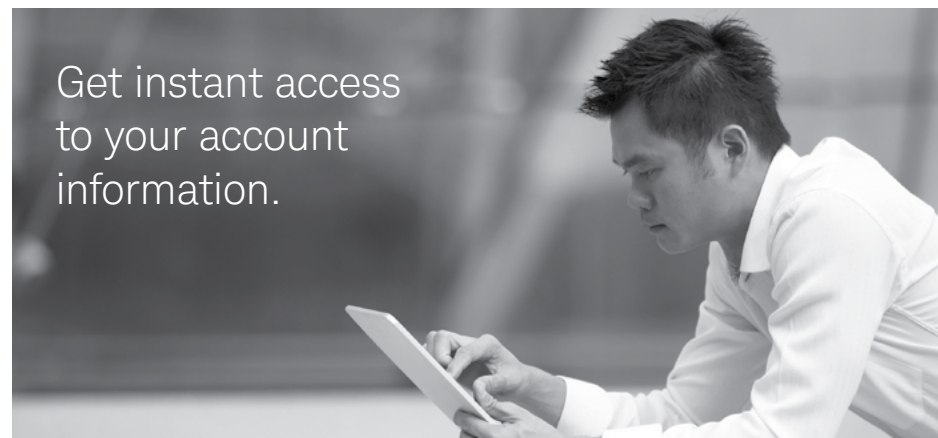


For illustrative purposes only.

## Monitor your accounts easily and securely

- Get instant access to your account information online, or on-the-go with the Schwab mobile app.
- Stay informed on the status of requests and securely approve transactions.
- Keep your contact information up to date so you can be notified.
- Count on secure, paperless delivery of important documents, including account statements, trade confirmations, and tax reports.\*
- Conveniently deposit checks with a click of the camera on your phone or tablet.
- Grant View Only access to third parties, such as CPAs, attorneys, and family members.
- Enhance your account security by adding two-factor authentication.

Ask your advisor to initiate your online access to Schwab Alliance—it's free, fast, and easy.



Get instant access to your account information.

\*You must be listed as the account owner to enroll in electronic delivery.

# Setting up mobile access

## 1 Download the Schwab mobile app

Visit the app store for your mobile device and search for “Schwab mobile.”



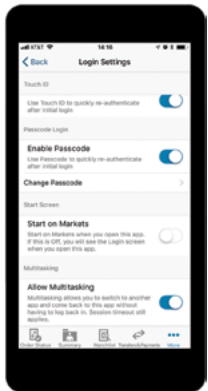
## 2 Log in to access your account

Use the same Schwab Alliance credentials you use online.



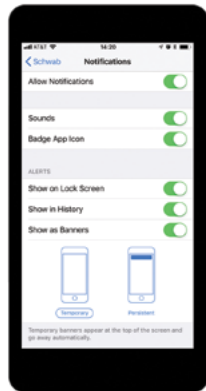
## 3 Check your mobile app settings

Navigate to “More” and select “Profile & Settings” and then “Login Settings.” Scroll to the bottom and turn on “Allow Multitasking” to approve transactions electronically from your device.



## 4 Turn on push notifications (for iOS/Apple devices only)

Navigate to your device “Settings” and select “Notifications.” Ensure that the Schwab app is in the list of included apps. You can choose to display alerts on “Lock Screen”, “History” and “Banners.” Alerts will notify you of money movement requests requiring your approval.



Sign up for online access today, or call a Schwab Alliance specialist at **1-800-515-2157**

The Schwab Mobile Deposit service is subject to certain eligibility requirements, limitations, and other conditions. Enrollment is not guaranteed, and standard hold policies apply. Access to electronic services may be limited or unavailable during periods of peak demand, market volatility, systems upgrade, maintenance, or for other reasons. Android is a trademark of Google, Inc. Apple and the Apple logo are trademarks of Apple Inc., registered in the U.S. and other countries. iTunes, App Store, iPhone, and iPad are trademarks of Apple Inc. © 2019 Charles Schwab & Co., Inc. (Schwab). All rights reserved. Member SIPC. TWI (1019-9SDH) MKT70909FM-02 (10/19)