

A STEP-BY-STEP GUIDE

How to create your Schwab Login ID and password.

To access your account on Schwab platforms, you'll need your own Schwab Login ID and password. Creating yours should only take about five minutes. And once your account has moved to Schwab, you'll have easy access to manage your entire portfolio in one place.

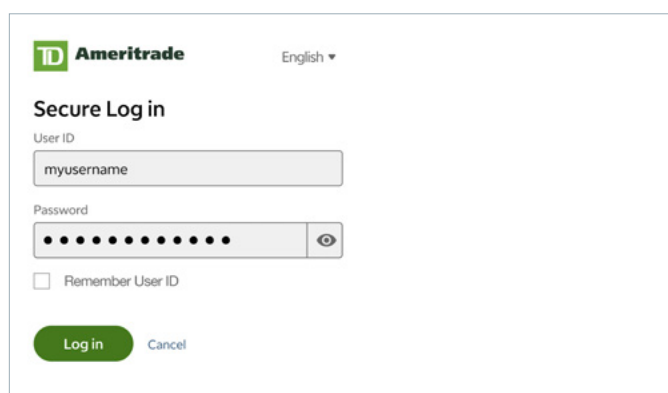
Everyone at Schwab needs to set up a unique Schwab Login ID and password that provides access to all accounts they own or are authorized to access.

So, whether your account move is scheduled and you've been notified to create your Schwab login info, or your account has already moved to Schwab, follow these steps and you'll be all set.

Already a Schwab client with a Login ID? Nothing new is needed—keep using your existing Schwab login info. After the move, you'll see all the accounts you own or are authorized to access together on your Accounts Summary page.

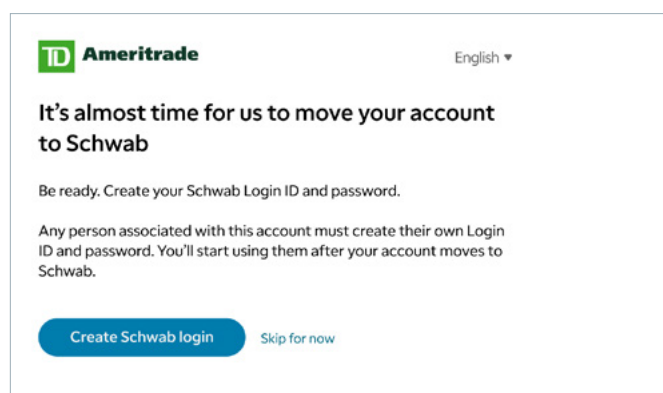
STEP 1: GET STARTED

Log in to tdameritrade.com or the TD Ameritrade Mobile app.



The steps are the same whether you use the website or mobile app. Can't remember your TD Ameritrade user ID or password? Get login help at tdameritrade.com/loginhelp.

Click the blue button.

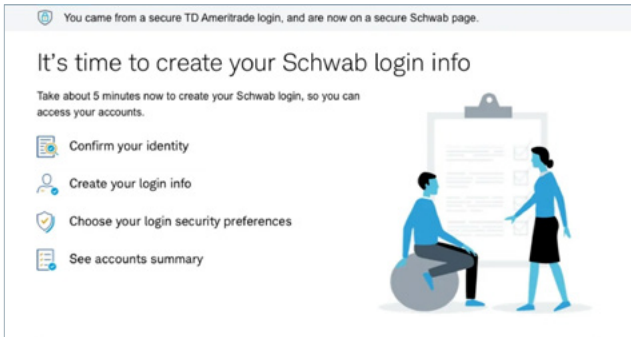


When it's time for you to create your new Schwab login info, you'll see a **Create Schwab login** button appear in several places on tdameritrade.com when you are logged in:

- A pop-up screen directly after you log in
- Your Account Overview home screen
- In the Schwab Transition Center

STEP 2: CREATE YOUR LOGIN ID AND PASSWORD

Here's where you'll start.



Confirm your identity.

This screenshot shows the "Confirm your identity" step in the process. A progress bar at the top indicates the current step is "1. Confirm Identity", with "2. Create Login Info", "3. Security Preferences", and "4. Review Accounts" following. The heading is "Confirm your identity". Below it, a note says, "For your security, each person must create their own login ID and password. Let's start with your personal information." There are two input fields: "Last 4 digits of your Social Security number or ITIN/FTIN" and "Date of birth (mm/dd/yyyy)".

Enter the last 4 digits of your personal Social Security number or ITIN (not that of an entity, like a trust or business) and your date of birth.

Create your Login ID.

This screenshot shows the "Create Login ID" step. A progress bar at the top shows "2. Create Login Info" as the active step. The heading is "Create Login ID". There are two main options: "Use TD Ameritrade user ID" (with the example "lucasgreen10" below it) and "Create new Login ID".

If your current TD Ameritrade user ID is available, you'll see the option to keep using it. If it's not available, you'll go straight to creating your Schwab Login ID and password.

Follow the prompts to finalize your Login ID and create a password.

This screenshot shows the "Create your Login ID and password" step. A progress bar at the top shows "2. Create Login Info" as the active step. The heading is "Create your Login ID and password". There are four sections: "Your Login ID" with a text input field; "Your password" with "New password" and "Confirm your new password" fields; and "Your security question answer" with a "Security question" dropdown menu and an "Answer" field.

Your Schwab Login ID cannot contain more than 8 numbers in a row (avoid using phone numbers or account numbers).

STEP 3: SET YOUR SECURITY PREFERENCES

Your login info is all set up. Now let's add an extra layer of security to protect your account online. 2-step verification safeguards your account information even if your Login ID and password become compromised. Learn more at schwab.com/legal/deviceid.

Choose your 2-step verification preference.

1. Confirm Identity 2. Create Login Info 3. Security Preferences 4. Review Accounts

✓ Your Schwab login info is all set.

Choose how often you want 2-step verification

What is 2-step verification?

Every time I log in When I am not on a trusted device

If you select
Every time I log in:

If you select
When I am not on a trusted device:

Choose how you want to confirm your identity.

1. Confirm Identity 2. Create Login Info 3. Security Preferences 4. Review Accounts

Choose how to confirm your identity

When you log in again, how would you like to confirm your identity?

Schwab app Text message

Need to update a phone number?

Schwab Mobile app: Download the Schwab Mobile app at schwab.com/mobile to verify your identity on your mobile device each time you log in. Follow the on-screen prompts in the next step.

Text message: Use a code sent via text message to your mobile device to verify your identity each time you log in. Follow the on-screen prompts in the next step.

Has your mobile number changed?

If your contact details are out of date, use the Schwab Mobile app to verify your identity. Note: You will be able to update your contact information after your account has moved to Schwab.

We'll ask you to verify this device.

1. Confirm Identity 2. Create Login Info 3. Security Preferences 4. Review Accounts

Trust this device

A trusted device is one that you use frequently, like your own computer or mobile phone.

Would you like to make this a trusted device?

Yes, trust this device No, don't trust this device

Yes, trust this device: You'll skip 2-step verification on this device.
No, don't trust this device: You'll do 2-step verification on this device to make sure it's you.

Yes, trust this device: You won't need to verify your identity when you log in using this specific device again.

No, don't trust this device: You'll need to confirm your identity each time you use this device.

Prepare ahead of time to log in when you're not on a trusted device.

1. Confirm Identity 2. Create Login Info 3. Security Preferences 4. Review Accounts

Use the Schwab Mobile app for 2-step 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.

Take a couple minutes now to set up the app on your device.

If you're logging in from a device that isn't trusted—or you use multiple devices to access your account—you can use the Schwab Mobile app for 2-step verification.

STEP 4: REVIEW YOUR ACCOUNTS MOVING TO SCHWAB

Now take a moment to look over the details, including a personalized view of which accounts are moving to Schwab and when.

The screenshot shows a confirmation screen with a green checkmark and the text "Your Schwab login info is all set". Below this, it asks "When can I use Schwab?" and provides a timeline: "You will have account access to Schwab on May 30. Until the transition, continue to use TD Ameritrade platforms." A blue box indicates "Transition begins 7 days" starting on Friday, May 26 at 8:30 pm ET. It also notes that the transition happens on a holiday weekend while markets are closed. A table lists accounts that will complete transition on May 30, with columns for TD Ameritrade Account, Schwab Account Type, and Your Role. The table includes three rows: one for an IRA (Individual), one for a Trust (Trustee), and one for a Beneficiary (Authorized user). There is a link to "Show account numbers" and a note at the bottom: "Why are there missing or extra accounts? What do account type and role mean?"

TD Ameritrade Account	Schwab Account Type	Your Role
.....567	IRA	Individual
.....135	Trust	Trustee
.....245	Beneficiary in Common	Authorized user

Reminder: Please make note of when your account access at TD Ameritrade ends—and when it begins at Schwab. The move is scheduled to happen over a weekend to avoid disruptions to your investing.

If any accounts are missing: Please review the possible reasons by clicking the appropriate link for details at the bottom of the screen.

Revisit this screen anytime: You can use your new Schwab login info on Schwab platforms to return to this screen anytime before your account move is complete.

Answers to top questions.

Do I need a Schwab Login ID and password if I don't access my account online?

No. If you don't want online account access, there's no need to create Schwab login info. You can contact Schwab directly by phone 24/7.

When will I have access to my account at Schwab?

Your account will move to Schwab over a weekend. On the day the market opens following your transition weekend, starting at 5 a.m. ET, you'll be able to access your accounts for the first time on Schwab.com and the Schwab Mobile app. thinkorswim® will be available at Schwab later in 2023.

I don't remember my TD Ameritrade user ID and/or password. What should I do?

For help logging in to your TD Ameritrade account, please visit tdameritrade.com/loginhelp or call TD Ameritrade anytime, 24/7, at **800-669-3900**.



Questions about your account move or creating your Schwab login info?
Give us a call at **800-780-8614**.

Brokerage Products: Not FDIC Insured • No Bank Guarantee • May Lose Value

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The Schwab Mobile app requires a wireless signal or mobile connection. Access to Electronic Services may be limited or unavailable during periods of peak demand, market volatility, systems upgrade, maintenance, or for other reasons. Functionality may vary by operating system and/or device. Mobile carrier data charges may apply.

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CC8537849 (0423-38B9) (0723-3XA8) MKT120283FM-01 (07/23)



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