

Initiating eStatements and eConfirms for your Schwab Institutional Accounts

Turning off paper statements and paper trade confirmations and switching to electronic versions of these important documents is quite simple that can be done in minutes. Access to Schwaballiance.com is required in order for you to be able to follow these procedures online. If you do not have access to Schwaballiance.com, please contact Schwaballiance at (800) 515-2157.

For eStatements

Step	Action
1	Log into Schwaballiance.com using your Customer ID and password.
2	Go the "Account" tab.
3	Click on the "eDocuments" secondary tab.
4	Click on the Delivery Preferences sub-tab.
5	Check eStatements column.
6	Validate the primary email address or enter a new one.
7	Review and agree to the Paperless Consent.
8	Click "Submit"

For eConfirms

Step	Action
1	Go to the "Account" tab
2	Click on eDocuments
3	Click on Delivery Preferences
4	Click on the link "Modify your Trade Confirmation Delivery Preferences"
5	Check next to accounts that you want to enroll in eConfirms.
6	Note: If you also want to get electronic mutual fund prospectuses select the accounts for Electronic Delivery of Mutual Fund/Shareholder.
7	Review and agree to the Paperless Consent
8	Click "Submit"