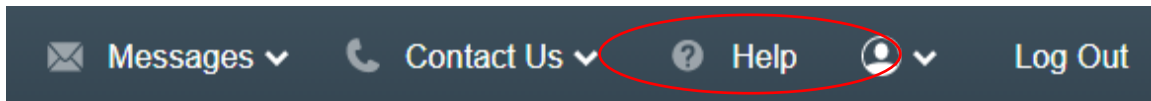


Q: How do I login to Charles Schwab... and what can I do?

Once we establish your accounts and the assets have transferred, you can establish online access to your account information on Schwab Alliance @ www.schwaballiance.com. You'll simply need one of your account numbers and your social security number to get started. As an extra layer of security Schwab will text an access code to your mobile phone or call you directly. If you need further assistance, call us or the Schwab Alliance team at 800-515-2157.

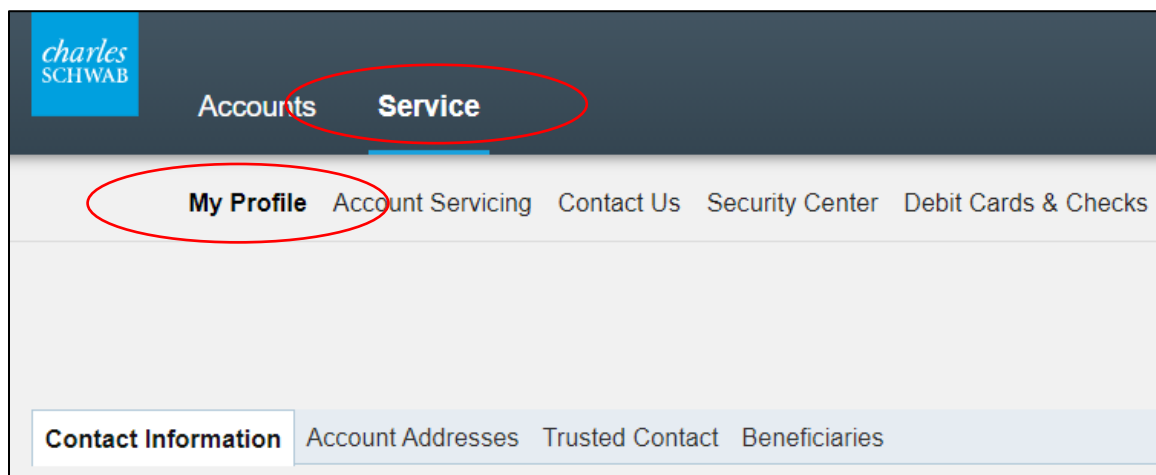
Once logged in, you can update personal information, trusted contacts and beneficiaries as well as nickname accounts, add an authorized viewer and review your paperless settings. Please see below for a visual guide. For help on ANY page, click "Help" on the top right to get detailed instructions.



➔ UPDATE PERSONAL INFORMATION

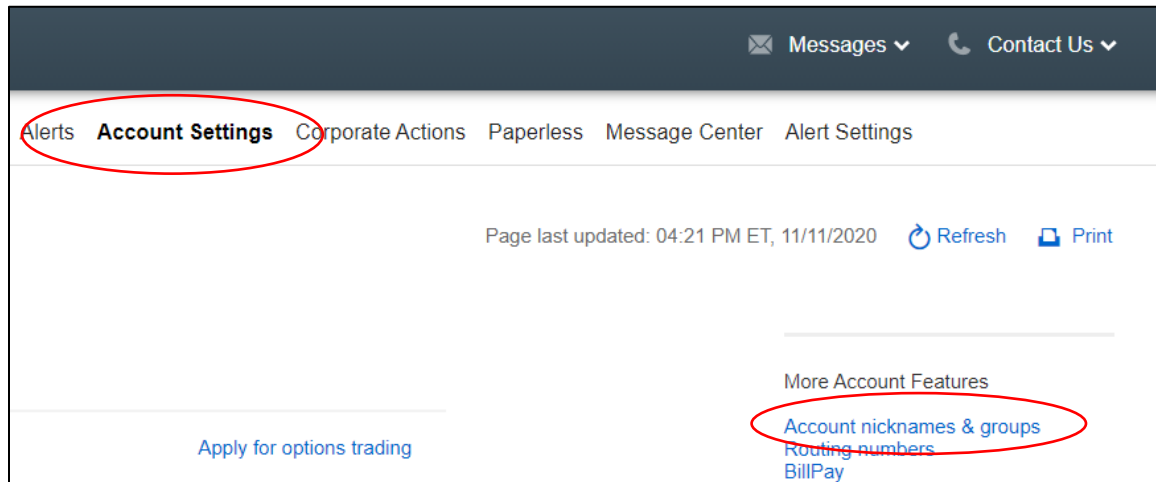
Service > My Profile > Click Appropriate Tab

- ➔ Contact Information
- ➔ Account Addresses
- ➔ Trusted Contact
- ➔ Beneficiaries



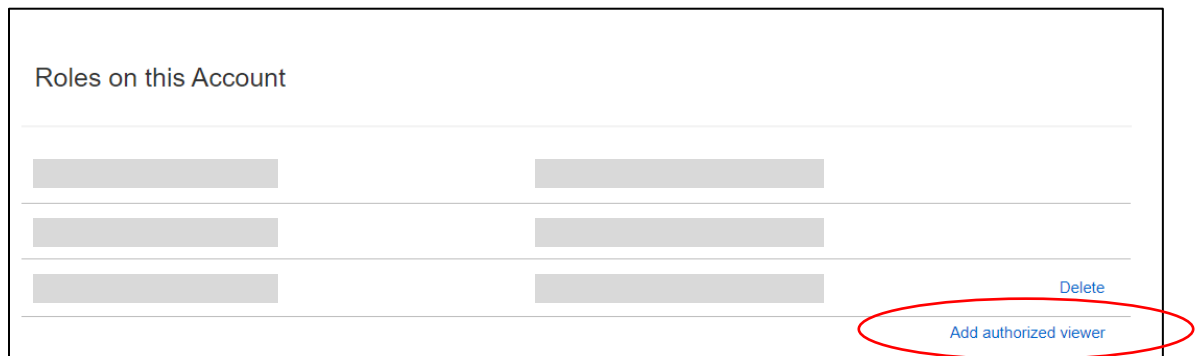
➔ NICKNAME ACCOUNTS

Service > Account Settings > Click “Account Nicknames & Groups” (right side of screen)



➔ ADD AUTHORIZED VIEWER

Service > Account Settings > Scroll down to “Roles on this Account” > Click “Add Authorized Viewer” (bottom)



➔ REVIEW OR UPDATE PAPERLESS SETTINGS

Service > Paperless

