Full financial picture

Get a clear snapshot of your accounts on the **Accounts Summary** tab. Here you'll find major indices, balances including daily changes, and a summary of individual holdings. You can also perform a number of account-related tasks.

Accounts	Trade R	esearch Products	Specialty	Service		Dol Lookup Quote	
	Balances		nance Histor	y Transfers & P	ayments Message	Center	
ccounts	Summa	ry			⊠ <u>Fe</u>	edback 🕀 Print 🖓 Help A 🗛 🗛	View real-time
					Pag	e last updated: 3:56 PM ET <u>Refresh</u>	day change at t
Brokerage	Accounts		Value	Day Change	Activity	Next Steps	account level.
				\$ <u>%</u>			
2344-XXXX	Active Trad	er	\$5,355.81	▼ \$15.53	No Activity	Balances Positions Transactions History	
<u>2653-XXXX</u>	Roth IRA		\$4,672.13	★ \$176.55	No Activity	Balances Positions Transactions History	Easy access to detailed account
<u>2653-XXXX</u>	Primary Bro	kerage	\$4,880.97	▼ \$22.54	1 Order	Balances Positions Transactions History	information.
<u>3115-XXXX</u>	Managed		\$0.00	▲ \$0.00	No Activity	Balances Positions Transactions History	
<u>3177-XXXX</u>	Domestic In	I	-\$16.02	▲ \$0.00	No Activity	Balances Positions Transactions History	
<u>7935-XXXX</u>	Employee		\$10,583.08	★ \$126.19	No Activity	Balances Positions Transactions History	
<u>7978-XXXX</u>	Alliance		\$8,882.36	★ \$52.73	No Activity	Balances Positions Transactions History	
<u>8369-XXXX</u>	Individual		\$0.00	▲ \$0.00	No Activity	Balances Positions Transactions History	
Totals			\$34,358.33	▼ \$393.54		All Balances All Positions	
As of 07/24/08	3 03:56 PM ES	ST					
Charles S	chwab Bank	8	Deposits	Balance Owed	Details	Next Steps	
<u>4400-00709</u>	369 1	Investor Checking	\$0.00		Pending Transactions: Available Funds:	\$0.00 <u>Balances History</u> \$0.00	
6400-00709		Overdraft: OCL		Not Available	Not Available	Balances	

Compare your holdings in an aggregate view of vour Schwab accounts.

Frequently asked questions

1. How do I get a login ID and password for schwaballiance.com?

You have three options to obtain a login ID and password. Choose one of the following:

- Ask your investment advisor to initiate on your behalf.
- Call Schwab Signature Alliance at 800-515-2157.
- · Register online at www.schwaballiance.com.

We recommend changing your password at least once every six months. For best practices on creating a login ID and password, go to www.schwab.com/sa_protect.

2. Is there a fee for this service?

No. Schwab Signature Alliance is provided at no cost to clients of investment advisors working with Schwab Institutional[®].

- 3. Can I still call my investment advisor for information now available on schwaballiance.com? Yes. Schwab Signature Alliance services are designed to complement, rather than replace, the services you get from your investment advisor. You can call your investment advisor any time you want assistance with your financial plans and goals. Your account information will always be online for your convenience.
- 4. What support does the Schwab Signature Alliance phone team offer and when? The dedicated team can help with general information and online support, such as issuing a login ID and temporary password or resetting a password. They are available Monday through Friday, from 8:30 a.m. to 7:00 p.m. ET.
- 5. How do I know that my personal account information and transactions are secure? Schwab takes precautions to ensure that your personal account information and transactions are protected and accessed only by authorized individuals. For more information, go to www.schwab.com/sa_protect.
- 6. How do I update my personal information?

To view and update your personal information, including mailing and email address, go to the Service Tab/My Profile.

7. I'm interested in receiving my account documents online only. How do I go paperless? Once you have a schwaballiance.com login ID and password, go directly to the Paperless Enrollment page at www.schwab.com/sa_gopaperless.

For more information

If you have questions, contact your investment advisor or call Schwab Signature Alliance at 800-515-2157.



Schwab Signature Alliance[®]—a service designed to complement your relationship with your investment advisor.

Receive dedicated phone support plus secure online access to schwaballiance.com—a Web site designed exclusively for clients of independent investment advisors that custody at Schwab.

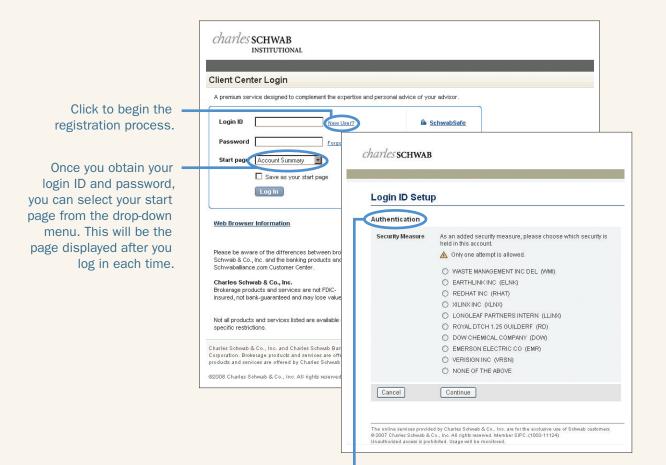
- Account history, positions and transactions
- A 10-year archive of account documents
- Portfolio performance with real-time balances
- Transfer and payment information
- Quotes and current market information



Account information at your fingertips

It's easy to access account information on schwaballiance.com. You'll need to obtain a schwaballiance.com login ID and password. To get started, choose one of three options that is most convenient for you:

- · Ask your investment advisor to initiate on your behalf.
- Call Schwab Signature Alliance[®] at 800-515-2157.
- Register online at schwab.com/sa_webactivate.



You will need a copy of a recent statement on hand, as our secure online registration process requires some account-specific details.

Instant access to your account information

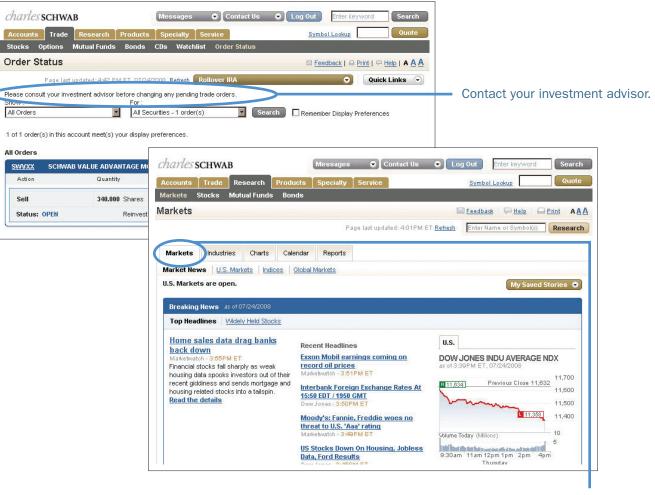
The **Account** tab features the details investors look for most often, including a 10-year archive of account statements, trade confirmations and tax reports.

Accounts Trade R	esearch Produ	cts Specialty	Service		<u>Symb</u>
Summary Balances	Positions Perfe	ormance History	Transfers	s & Payments	Message (
Balances (Real Ti	me)				port
Page last upd	ated: 07/24/2008, 4:	DO PM ET <u>Refresh</u>	oint Tenant	086-XXXX	
Joint Tenant 3086-)	xxx				
Total Account Value	-0.59 %	↓ -\$52.55	5	\$8,882.54	
🕞 Cash		Rates		Balances	Margin
Cash Balance		Rates 🗗		\$0.00	Funds A
Margin				\$1,121.52	To Trade
Total Cash				\$1,121.52	Cash
♂ Other Details					0.000
Option Requirement		\$0.00	\$0.00 Accounts Trade Rese		
Total Margin Balance		\$1,121.52	\$1,121.52 Summary Balances Pos		
Investments	NonMargin	Margin History			
Securities					
Market Value	\$0.00	\$7,761.02		Transactions Statements	
			A	II Statements & I	Reports S
Total Account Value	+ -0.59%	↓ -\$52.55	5	Select Date R	00000
Account balances are from th		07/22/2000 hut also		From: 04/26/2008	
ire subject to change.	morra	Maximum range is 10 years			
				3 Document(s) Fo	und
	Account				
et real-time bal		Statements			
ositions, perfori		Joint Tenant 3086-XXXX			
ccount history o		Joint Tenant 3086-XXXX Joint Tenant 3086-XXXX			
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Trade order status and market information

The **Trade** tab provides access to the order status of trades your investment advisor has placed on your behalf. Although you also have the ability to place trades from this tab, please consult your investment advisor before using this feature. The **Research** tab provides market, equity and industry information and research from respected sources.



[·] archive of nts, trade d tax reports.

View real-time stock quotes and market research.