

View Only access for your Schwab accounts.

Now there's a convenient way to share your account details with people you trust. Simply log in to Schwab.com and authorize anyone of your choosing for View Only online access.

Key benefits

Online account access—You may authorize your spouse, family members, tax advisor, or other individuals to monitor your accounts on Schwab.com.

Convenience—Schwab View Only allows you to grant access to authorized viewers without adding a Power of Attorney or duplicate statements to your account.

Comprehensive account details—Authorized viewers can check balances, positions, transaction history, statements, confirmations, and tax documents. However, they won't be able to place trades, transfer money, or make other account changes.

Frequently asked questions

Q. What account information can an authorized viewer see?

A. Authorized viewers will be able to review, print, download, and save up to ten years of historical account information, including your tax information, balances, positions, transactions, investment returns, cost basis, reports, and realized and unrealized gains and losses. They will also be able to see other non-public, personal, identifiable information such as your Social Security number, mailing address, telephone number, and email address. This access will continue indefinitely until you revoke it or close your account.

Q. What can't an authorized viewer do?

A. The authorized viewer won't be able to place trades, move money into or out of your account, or change your account settings.

Q. What accounts are ineligible for View Only access?

A. There are account types to which you cannot add an authorized viewer. For example, some of these include:

- Schwab Global Account™
- Schwab Bank
- optionsXpress

Please contact a Schwab investment professional if you have questions concerning the eligibility of your account.

Frequently asked questions
(continued)

Q. Will the authorized viewer have access to all of my Schwab accounts?

A. If you have multiple Schwab accounts, you can decide which ones to grant access to, or even designate different individuals to view different accounts.

Q. Is my account information still secure when using View Only?

A. With View Only, an authorized viewer can log in to schwab.com, our secure website, to view account details. You can use View Only as an alternative to emailing account information or mailing duplicate documents. To learn more about account protection, visit schwab.com/security.

Q. How do I add an authorized viewer to my account(s)?

A. Visit schwab.com/roles and log in to your account. Select “add authorized viewer” and follow the instructions. Once the authorized viewer has visited schwab.com and provided their information, they will have access to your Schwab account.

Q. How do I remove an authorized viewer from my account?

A. If at any time you would like to remove an authorized viewer from your account, please visit schwab.com/roles. Log in to your account and select the name(s) you wish to remove. You may also contact a Schwab investment professional at 1-800-435-4000.

To enroll in View Only

Visit schwab.com/roles

Contact your Schwab Financial Consultant

Call 1-800-435-4000

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

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