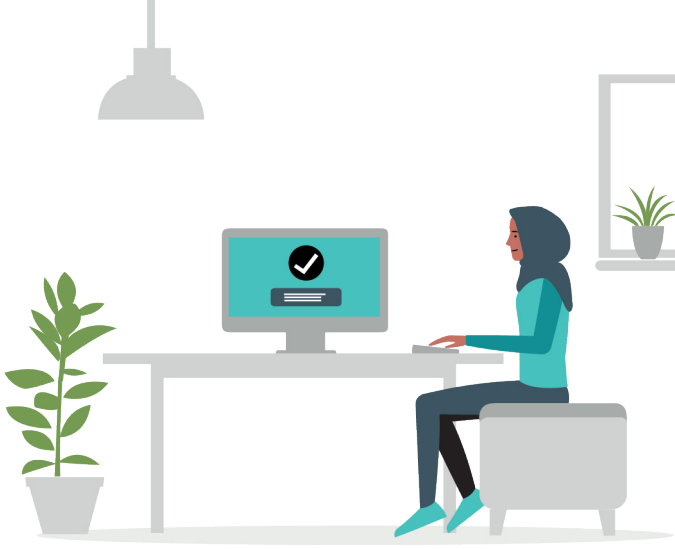
How to add and manage an authorized user

Follow these instructions to learn how to add and manage an authorized user to your Schwab account.

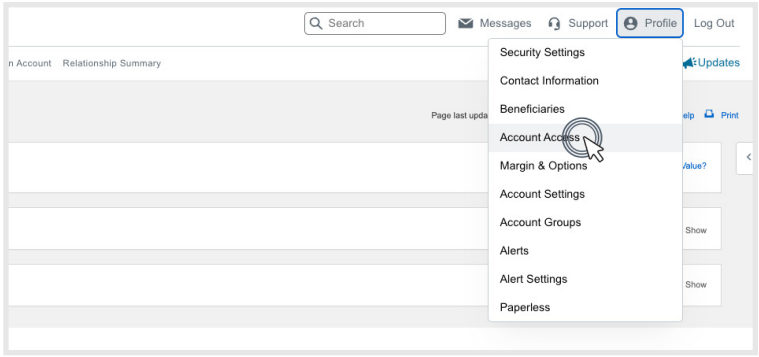


Note: For illustrative purposes only. Screenshots are historical in nature.

How to add an authorized user

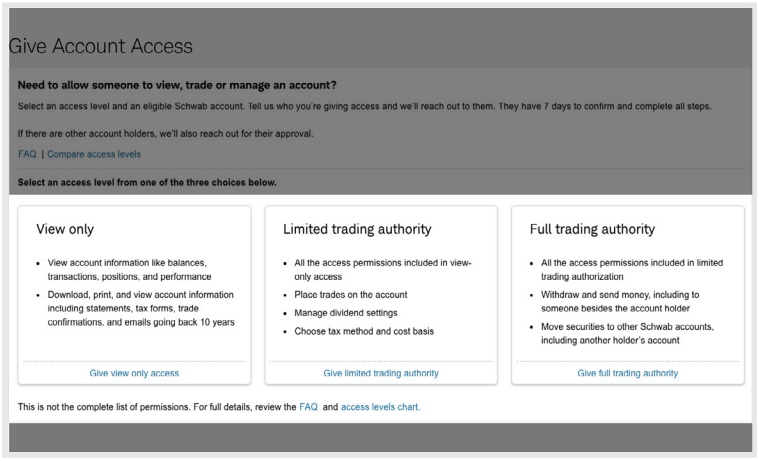
Get started

Log in to your account. Select **Profile** in the top right corner, then select **Account Access**.



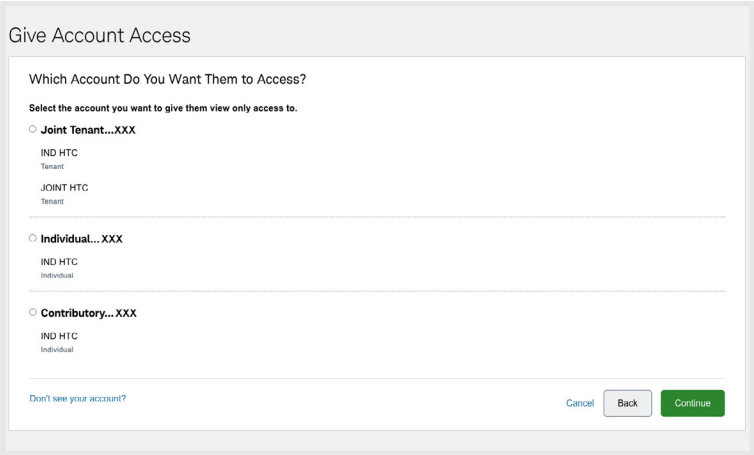
Step 1

Select **Give Account Access**. You will then see three access levels to choose from as well as a link to a comparison chart to learn more about each level.



Step 2

Once you've determined which type of access you would like to allow, make your selection and choose the account(s) you wish to share access to.

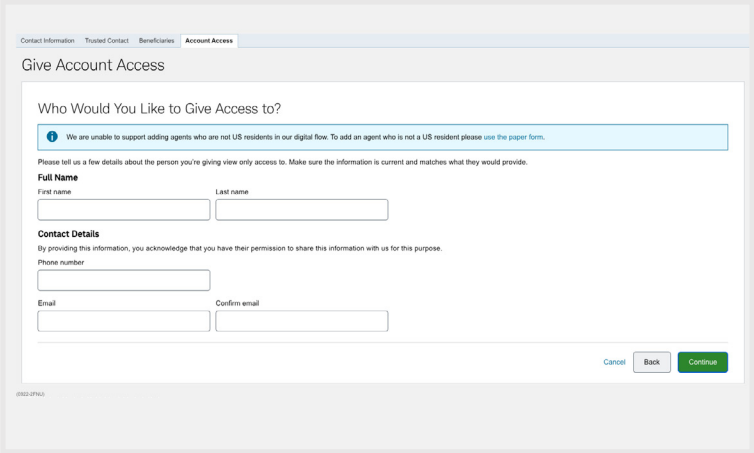


Step 3

Fill out the required details of the person you're giving access to. Review the information you have provided and, if correct, select **Continue**.

Note: Currently we are unable to support adding agents who are not US residents in our digital flow.

To add an agent who is not a US resident please use the paper form.

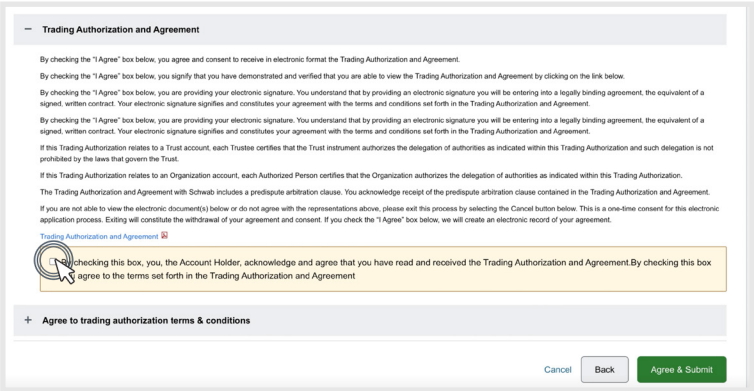


Step 4

Read and acknowledge both the **Trading Authorization and Agreement** as well as the **Trading authorization terms & conditions**.

Then select **Agree & Submit**. You will then receive a confirmation message with additional next steps.

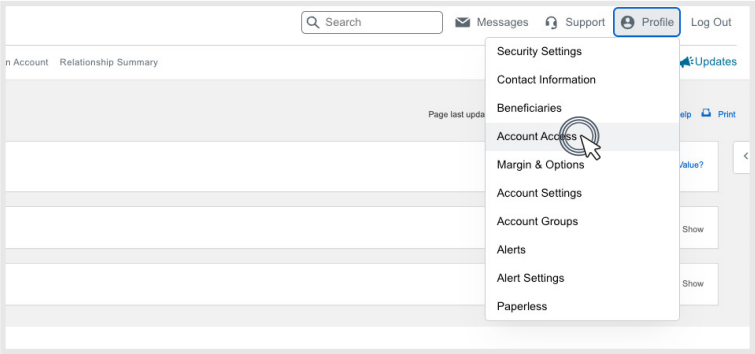
Your authorized 3rd party will receive an email which requires confirmation before continuing.



How to manage an authorized user

Get started

Log in to your account. Select **Profile**, then select **Account Access**.



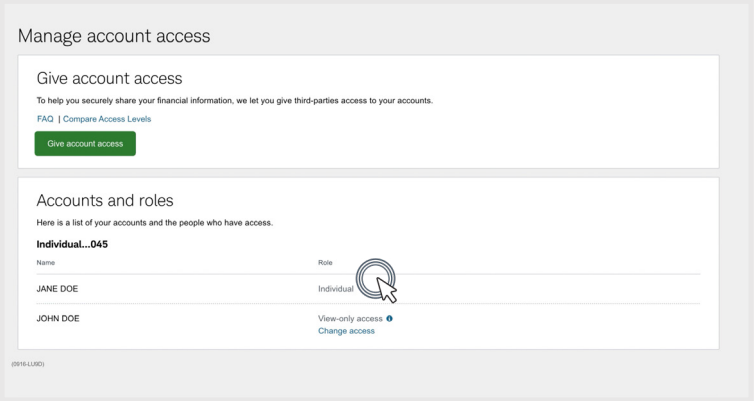
Step 1

Scroll down to the **Accounts and roles** section.

Choose the action you'd like to take next to the user's name.

You'll then be prompted with further instructions, which will vary depending on the action you choose to take.

You'll always receive confirmation after completing the steps.



Visit our How To Center for helpful videos and more on managing your account and investing online.

Investment and Insurance Products: Not a deposit ▪ Not FDIC-Insured ▪ Not Insured By Any Federal Government Agency ▪ No Bank Guarantee ▪ May Lose Value

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