



GALEON
ASSET MANAGEMENT

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SET UP YOUR ACCOUNT ONLINE ACCESS/SCHWAB ALLIANCE ENROLLMENT

You can set up your Schwab online access from your phone, tablet, or computer through the internet browser of your choice. The Schwab App will be used later to access your account on-the-go, and it will not be used for initial account activation.

Option 1: Check Your Email

- Look for an activation email/link from Charles Schwab. This will be sent 14 business days after the account is opened due to the Patriot Act. If you need immediate access, proceed to **Option 2**.

1. Verify Your Identity

- a. Schwab will ask you to verify personal information to confirm your identity.
- b. Follow the prompts on the screen.

2. Create Your Login

- a. Set up your Schwab online credentials and security information.
- b. Be sure to save your username and password in a secure location.

3. Review Your Preferences

- a. Schwab may ask you to select account preferences, including paperless delivery for statements, tax documents, and other communications.

4. Complete Any Pending Requests

- a. If Galeon has sent account-opening documents or other requests for your approval, review the information carefully and follow the prompts to electronically approve and submit them. These emails may come from DocuSign.

Option 2: Go to Schwab.com

1. Go Directly to Schwab.com via an internet browser, not the APP
2. Select, "First Time User."
3. Follow the steps above, 1-4. You will need your Schwab account number, SSN, date of birth and cell number on file at Galeon.

ACCESSING YOUR ACCOUNT FROM YOUR PHONE

Once your username and password are established through a web browser, download the Schwab Mobile app from the Apple App Store or Google Play Store. Sign in using the same Schwab credentials you created during enrollment.

NEED HELP?

If you do not see your Schwab activation email, have trouble enrolling, or have questions during the process, please contact Galeon Asset Management, and we will be happy to assist. 563.583.3585