



## Charles Schwab Donor Advised Fund Account Opening Guide

1. <https://onboard.schwab.com/retail/personal-info> use this link to open a new Schwab Donor Advised Fund

### 2. Enter your personal information

Who's opening this account?

Tell us a little about yourself.

Why is Schwab Charitable asking you for this information?

#### Personal information

First name

Middle name (Optional)

Last name

Suffix (Optional)

Is your current home address in the United States, Puerto Rico, or the U.S. Virgin Islands?

- Yes  
 No

Date of birth (mm/dd/yyyy)

Social Security number

#### Contact information

By providing your email address, you consent to receiving electronic communications from Schwab Charitable. Once you open an account, you may request paper communications via the Client Center, or you may contact us at any time at 1-800-746-6216.

Email

Mobile phone number

To learn how your personal information may be used and how you may limit certain use, read Schwab Charitable's Privacy Notice.

### 3. Log into Schwab

 It looks like you already have a Schwab Login ID and password. For your security, and to make your application easier, log in to continue.

#### Log in to Schwab

Login ID

Password

Log in

[Forgot Password?](#)

### 4. Select how you would like your funds invested

How would you like Schwab Charitable to invest the funds?

After you make a contribution, you can recommend how to invest the assets for tax-free potential growth, so that you can give more to charity.

Why are we asking you to complete this now? 

Review and select from the investment options. You can recommend any combination, as long as they equal 100%.



Need more time to decide? Select 100% Money Market Pool and recommend changes later.

Total percentage of assets: 0 / 100%

#### Asset Allocation Pools

Conservative Pool

 %

Balanced Pool

 %

Socially Responsible Balanced Pool

 %

Growth Pool

 %

(If you plan to immediately grant funds to your desired charity, put 100% into the Conservative Pool)

## 5. Provide your new account number with your advisor to begin making contributions.

Your application is currently being reviewed,



We're reviewing your request for a **Schwab Charitable donor-advised fund** account.

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### Next steps

Contribute to your new account once it has been approved. It usually takes a few days to review your request. We'll email you when we're done.

### What to do while you wait

[Explore resources](#)

[View your account summary](#)



Your security is our priority.

[How to make a grant video.](#)