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Personalized Wealth Management

SIGN UP FOR SCHWAB ALLIANCE TODAY!

BY MARILYN BLANCARTE

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"Discover the many benefits of signing up for Schwab Alliance."

I want to say thank you to all of you who have already signed up for Schwab Alliance! I hope you have found it to be beneficial. For those who have not signed up, there are many benefits to having Schwab Alliance access. Here are a number of them:

- For starters, changing your mailing preferences to electronic delivery on statements, confirms, shareholder materials and even your tax documents will cut down tremendously on the amount of mail you receive each month from Schwab.
- By having access to your Schwab accounts either by mobile app or your PC, you can view, print, or email your documents on demand at your discretion.
- In addition, having the ability to eSign documents via DocuSign, change your address, update your beneficiaries, approve money transfer requests, setup a Schwab MoneyLink to your bank account, view recent activity, and much more, allows you to manage account details securely and quickly without the hassle of waiting for forms to come in the mail, return the forms and then wait for Schwab to process your request.

To get started with signing up for Schwab Alliance, please email marilyn@mamportfolios.com. I will initiate the activation email to get you started with the registration process. Alternatively, you can click here and navigate to the "New user?" link within the log in box. Schwab Alliance's dedicated 800-515-2157 number is for our clients to call if you need assistance or get locked out of your account. Unfortunately, we are not authorized to unlock your account or reset passwords. Please click here to view Schwab Alliance's brochure for additional reference, including instructions on setting up mobile access.

McCarthy Asset Management, Inc. is an independent, fee-only investment advisory firm that has been helping people invest wisely for over fifteen years. Our mission is to help you better understand and improve your financial situation. We specialize in Retirement Planning, Portfolio Management and Tax Planning.