

Add an Alias ("Second Name") to Your Account

www.schwab.com 1-800-435-4000 (inside the U.S.) +1-415-667-8400 (outside the U.S.) 1-888-686-6916 (multilingual services)

1. Requirements for Adding An Alias To Your Account

- Use this form to update Schwab's records to indicate a second name you are also known as ("AKA," e.g., a maiden name or nickname).
- This form allows Schwab to accept checks/deposits/securities in a second name. All documents will still require your full legal signature.
- If you are legally changing your name, please complete the Change Your Legal Name form.

2. Account Holder Information

If you have multiple accounts, enter one account number, and all of your Schwab accounts will be documented with your second name/alias.

Schwab Account Number

Name on Account(s) As It Appears on Your Statement(s)

3. Alias Request

If you are known by another name, please print the alias that you wish to add to your Schwab account(s) and provide that signature.

Name First

Middle

Last

X

Provide the signature that corresponds to the alias above.

Today's Date (mm/dd/yyyy)

Name First

Middle

Last

X

Provide the signature that corresponds to the alias above.

Today's Date (mm/dd/yyyy)

4. Please Read and Sign

Please sign below using your name as it appears on your Schwab account registration.

By signing below, I authorize Schwab to act on all instructions given on this form. I also certify that all of the information I have provided to Schwab in connection with this form is correct.

X

Signature: Account Holder (Existing Name)

Today's Date (mm/dd/yyyy)

Print Name

5. Return Instructions

- **Upload** online with secure messaging (if you are an existing client and have online access to your account).

1. Go to www.schwab.com and log in to your account.
2. Click Message Center (under Service), and then click Upload Document.

- **Fax** to 1-888-526-7252.

- **Bring** to your nearest Schwab branch (visit www.schwab.com/branch for locations).

- **Mail** to any of the following addresses:

Regular Mail (West)

Charles Schwab & Co., Inc.
P.O. Box 982600
El Paso, TX 79998-2600

Regular Mail (East)

Charles Schwab & Co., Inc.
P.O. Box 628291
Orlando, FL 32862-8291

Overnight Mail (West)

Charles Schwab & Co., Inc.
1945 Northwestern Drive
El Paso, TX 79912

Overnight Mail (East)

Charles Schwab & Co., Inc.
1958 Summit Park Dr., Ste. 200
Orlando, FL 32810