

MCGILL ADVISORS, INC.
CHARLES SCHWAB
ONLINE SETUP INSTRUCTIONS

1. REQUEST USERNAME FROM YOUR RELATIONSHIP MANAGER
2. A LETTER WILL BE SENT BY CHARLES SCHWAB WITH TEMPORARY PASSWORD (3-5 DAYS)
3. FOLLOW THE INSTRUCTIONS ON LETTER TO SETUP PASSWORD
4. FOR FUTURE LOGINS TO CHARLES SCHWAB VISIT WWW.MCGILLADVISORS.COM AND CLICK "CLIENT CENTER" LINK ON TOP OF THE PAGE



5. CLICK "LAUNCH CHARLES SCHWAB"
6. CLICK "CONTINUE" ON THE NEXT PAGE TO BE TAKEN TO THE CHARLES SCHWAB WEBSITE
7. LOGIN TO VIEW ACCOUNTS

[LAUNCH CHARLES SCHWAB](#)

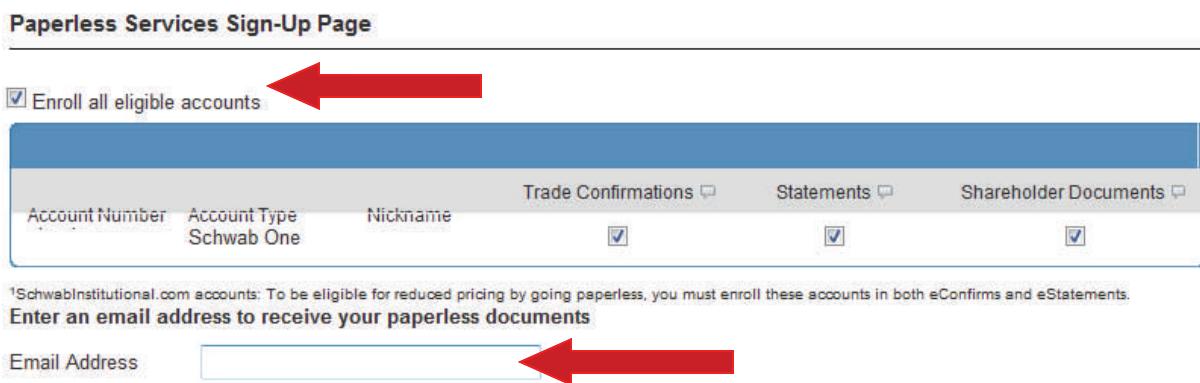
EACH CLIENT WILL NEED A USERNAME AND PASSWORD

***IF ANY ACCOUNTS ARE MISSING FROM YOUR ONLINE ACCESS OR TO RESET YOUR
PASSWORD PLEASE CONTACT CHARLES SCHWAB DIRECTLY AT 800-435-4000*

MCGILL ADVISORS, INC.
CHARLES SCHWAB
E-DELIVERY SETUP

1. GO TO WWW.SCHWAB.COM/SA_GOPAPERLESS
2. LOGIN USING YOUR PERSONAL USERNAME AND PASSWORD
3. CHECK THE ENROLL ALL ELIGIBLE ACCOUNTS BOX AND ENTER EMAIL ADDRESS

Paperless Services Sign-Up Page



Enroll all eligible accounts

Account Number	Account Type	Nickname	Trade Confirmations	Statements	Shareholder Documents
	Schwab One		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

*SchwabInstitutional.com accounts: To be eligible for reduced pricing by going paperless, you must enroll these accounts in both eConfirms and eStatements.
Enter an email address to receive your paperless documents

Email Address

4. CLICK SUBMIT

*****TO RESET PASSWORD OR OTHER LOGIN ISSUES PLEASE CONTACT
CHARLES SCHWAB DIRECTLY AT 800-435-4000***