

MCGILL ADVISORS, INC.  
CHARLES SCHWAB  
ONLINE SETUP INSTRUCTIONS

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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](http://WWW.MCGILLADVISORS.COM) AND CLICK "CLIENT CENTER" LINK ON TOP OF THE PAGE

MCGILL ADVISORS, INC.  
A REGISTERED INVESTMENT ADVISOR

HOME | ABOUT US | OUR APPROACH | INVESTMENT INSIGHTS | CLIENT CENTER



5. CLICK "LAUNCH CHARLES SCHWAB"

LAUNCH CHARLES SCHWAB

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

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

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1. GO TO [WWW.SCHWAB.COM/SA\\_GOPAPERLESS](http://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 <input type="checkbox"/>	Statements <input type="checkbox"/>	Shareholder Documents <input type="checkbox"/>
	Schwab One		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

<sup>1</sup>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***