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## STEP 1 - GETTING STARTED

- Using your preferred web browser, go to [client.schwab.com](http://client.schwab.com)
- Click on "New User?" located below the "Log In" button
- Click the green "Start" button

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## STEP 2 - ACCOUNT INFORMATION

- Enter your account number in the correct field (the 8 digit number at the top of your statement); if you have multiple accounts you can enter any of the account numbers
- Then, enter your "Date of birth", "Phone number", & "Social Security number" in the correct fields
- Click the green "Continue" button

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## STEP 3 - CONFIRM IDENTITY

- Choose to receive a text message or phone call from Schwab with a security code
- Type in that security code in the correct field
- Click the green "Continue" button

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## STEP 4 - CREATE CREDENTIALS

- In the first field, type in your desired login (username)
- In the next field, type in your desired password; your password MUST be at least 5 characters and NOT include symbols (e.g. !@#%&)
- Re-enter your new password in the next field exactly as it was entered in the field above
- Select a security question from the drop down menu titled "Security Question: What is your..."
- Type in the correct answer to the security question that you selected above
- Click the green "Continue" button

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## STEP 5 - GETTING STARTED

- For 2 step verification, choose "Every time I log in" or "When I am not on a trusted device" by clicking on your preferred option
- Click the green "Continue" button
- Choose to set up the Schwab Mobile app by clicking the green "Set up now" button, or skip this step by clicking "I'll do this later"
- A page will display "Your login info is ready" and click the green "Continue" button

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## Get in Touch

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