



Statement Bundling Letter of Authorization Form

Investment Advisor ("IA") Information (This portion to be completed by IA if applicable.)

IA Firm Name (please print) _____
IA Master Account Number _____ ISG Team _____

This form is a letter of authorization that can be used to bundle multiple accounts in one envelope or unbundle accounts into separate envelopes.

1. Account Information

I authorize Charles Schwab & Co., Inc. to execute the following bundling instructions on these accounts (see restrictions below):

Primary Account*

Bundle Unbundle Account Number _____ Account Name (as it appears on Statement) _____

Bundle Unbundle Additional Account Number _____ Account Name (as it appears on Statement) _____

Bundle Unbundle Additional Account Number _____ Account Name (as it appears on Statement) _____

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Bundle Unbundle Additional Account Number _____ Account Name (as it appears on Statement) _____

Bundle Unbundle Additional Account Number _____ Account Name (as it appears on Statement) _____

Bundle Unbundle Additional Account Number _____ Account Name (as it appears on Statement) _____

Bundle Unbundle Additional Account Number _____ Account Name (as it appears on Statement) _____

*The primary account's address will be used to mail the entire statement bundle. Unbundling requests do not require signatures.

2. Authorized Signature(s)

All account holders of all accounts to be bundled must sign (e.g., primary, joint, trustees).

▶ _____ Date _____
Account Holder Signature (mm/dd/yy)

▶ _____ Date _____
Account Holder Signature (mm/dd/yy)

▶ _____ Date _____
Account Holder Signature (mm/dd/yy)

▶ _____ Date _____
Account Holder Signature (mm/dd/yy)

FOR ADDITIONAL ACCOUNTS OR SIGNATURES, PLEASE USE ANOTHER BUNDLING LOA WITH THE SAME PRIMARY ACCOUNT.

Account bundling restrictions

1. All accounts in the bundle must have the same mailing address.
2. An account can exist in one bundle only, and a bundle must have at least two accounts.
3. Compact (portrait layout) and Comprehensive (landscape layout) Statement types cannot be bundled into the same envelope.
4. Retail and Schwab Personal Choice Retirement Accounts® will not be bundled with Schwab Institutional® accounts.
5. Trust registrations may be combined with other accounts only if the trustees are the same as the owners on the other accounts.
6. Corporate registrations may not be combined with any other registration types.