

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

IA Firm Name (please print): \_\_\_\_\_  
 IA Master Account Number: \_\_\_\_\_ Service 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. Statement Bundling Instructions**

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

**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. Different statement types cannot be bundled in the same envelope.
4. Retail and Schwab Personal Choice Retirement Account® statements cannot be bundled with Schwab Institutional® account statements.
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.

**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)

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)

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). Bundling instructions will remain effective until written notice is given to Schwab.

For additional accounts or signatures, please use another Statement Bundling Letter of Authorization Form with the same primary account.

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Signature: Account Holder Print Name (mm/dd/yyyy)

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Signature: Account Holder Print Name (mm/dd/yyyy)

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Signature: Account Holder Print Name (mm/dd/yyyy)

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Signature: Account Holder Print Name (mm/dd/yyyy)

