



Statement Bundling Letter of Authorization Form

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

IA Firm Name *(Please print.)*

IA Master Account Number Service Team

IA Contact Name *(if follow-up is required)* IA Telephone Number IA Email Address

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

- All accounts in the bundle must have the same mailing address.
- An account can exist in one bundle only, and a bundle must have at least two accounts.
- Different statement types cannot be bundled in the same envelope.
- Retail and Schwab Personal Choice Retirement Account® statements cannot be bundled with Schwab Institutional® account statements.
- Trust registrations may be combined with other accounts only if the trustees are the same as the owners on the other accounts.
- Corporate registrations may not be combined with any other registration types.

Primary Account*

<input type="checkbox"/> Bundle	<input type="checkbox"/> Unbundle	_____	_____
		Account Number	Account Name <i>(as it appears on statement)</i>
<input type="checkbox"/> Bundle	<input type="checkbox"/> Unbundle	_____	_____
		Additional Account Number	Account Name <i>(as it appears on statement)</i>
<input type="checkbox"/> Bundle	<input type="checkbox"/> Unbundle	_____	_____
		Additional Account Number	Account Name <i>(as it appears on statement)</i>
<input type="checkbox"/> Bundle	<input type="checkbox"/> Unbundle	_____	_____
		Additional Account Number	Account Name <i>(as it appears on statement)</i>
<input type="checkbox"/> Bundle	<input type="checkbox"/> Unbundle	_____	_____
		Additional Account Number	Account Name <i>(as it appears on statement)</i>
<input type="checkbox"/> Bundle	<input type="checkbox"/> Unbundle	_____	_____
		Additional Account Number	Account Name <i>(as it appears on statement)</i>
<input type="checkbox"/> Bundle	<input type="checkbox"/> Unbundle	_____	_____
		Additional Account Number	Account Name <i>(as it appears on statement)</i>

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

Please note: Signature(s) required on the following page.

