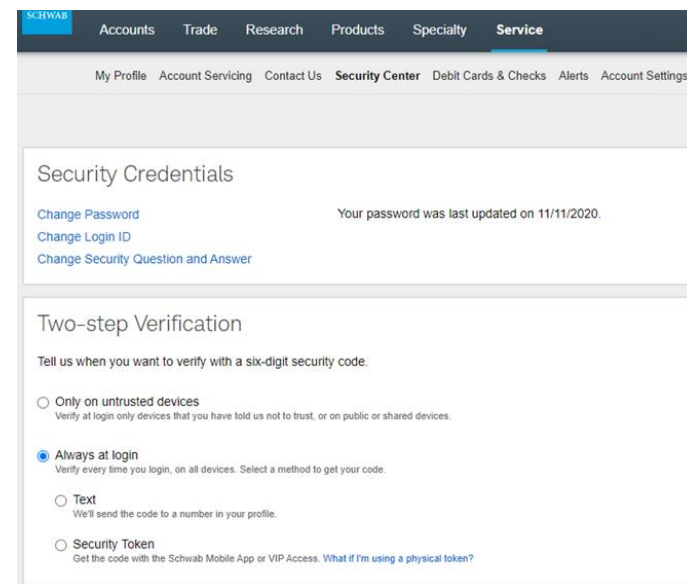


## Protect your accounts:

We strongly recommend that all clients set up 2-factor authentication on their investment accounts, and any outside accounts where this feature is available. 2-factor authentication (2FA) provides an extra layer of security for your personal accounts as a randomized 6-digit code is required with each login. Even if your password has been compromised, a code would also be required to gain access to your personal information.

### **For Charles Schwab Clients:** 2FA by Symantec VIP app or via text message

- Log into your Schwab account → Service tab → Security Center → Two-step verification
- Select “Always at login”
  - o You can choose to receive the code via text message to the number on your profile or via security token.
  - o If via the Symantec VIP app, please follow the steps provided when selecting this option.
  - o If you require further assistance, you can call Schwab Alliance at 800-515-2157.



### **For Fidelity Investment Clients:** 2FA by Symantec VIP app, phone call, or text message

#### **2FA by text or call**

- Log in to Fidelity.com - Security Center
- Select “enable” for 2-factor authentication via call or text message.

Or

#### **2FA by Symantec VIP Access app**

- Free Symantec VIP app available for Apple and Android devices
- Download the app and then call 800-544-6666 to activate with your Fidelity profile
- You can also visit: <https://www.fidelity.com/security/how-two-factor-authentication-works> for more information.

