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New clients who do not have a Charles Schwab & Co., Inc. ("Schwab") account (other than a Stock Plan Services account), open an eligible retail brokerage account, and enroll in the offer can earn a \$100 Bonus Award. The Bonus Award will be credited to the enrolled account within approximately one month of account open. For taxable accounts, the account must be maintained at Schwab for at least one year or Schwab may charge back the Bonus Award.

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Consult with your tax advisor about the appropriate tax treatment of the Bonus Award before enrolling in the offer. Any related taxes are your responsibility. For taxable accounts, the value of all Schwab offers received will be reported as Other Income on your Form 1099-MISC if, when combined with Other Income earned, the value totals \$600 or more during the calendar year. Recent IRS guidance may impact your ability to make more than one IRA to IRA rollover in a one-year period.

Charles Schwab received the highest numerical score in the J.D. Power 2016 Full Service Investor Satisfaction Study, based on 6,006 responses from 20 firms measuring opinions of investors who used full-service investment institutions and we are surveyed in January 2016. Your experiences may vary. Visit jdpower.com.

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