

Schwab Equity Award Center® Help Guide

Working with Schwab
to manage your equity
compensation



charles
SCHWAB

Own your tomorrow.

Table of contents

Contents

GETTING STARTED 1

How do I open my Schwab One® brokerage account?

How do I log in to my Schwab account?

What's the difference between a Schwab brokerage account and the Equity Award Center (EAC)?

Where can I go to get more information?

How do I get to the EAC?

How can I view the value of my award in a different currency?

How do I make a tax election?

STOCK OPTIONS..... 3

How do I exercise stock options?

What are the different stock option exercise methods?

EMPLOYEE STOCK PURCHASE PLANS (ESPPs)..... 5

How do I enroll in my company's ESPP?

Where can I see how much I've contributed toward the next ESPP purchase?

How do I change my ESPP contribution election?

How do I sell my ESPP shares?

RESTRICTED STOCK AWARDS (RSAs) AND RESTRICTED STOCK UNITS (RSUs) 8

Where do I find my vested RSA/RSU shares?

How do I accept a grant?

How do I sell my vested RSA/RSU shares in a Schwab brokerage account?

COST BASIS..... 11

How do I find the cost basis details for my RSA/RSU shares?

How do I find the cost basis details for my ESPP shares?

How do I update my cost basis?

WHERE TO FIND ORDER STATUS, TRANSACTION HISTORY, ACCOUNT STATEMENTS, AND FORMS 12

Where do I find my order status?

Where do I see historical transactions?

Where do I find statements and tax forms?

MOVING MONEY 15

How do I move money to or from my Schwab account?

CONTACT US



Call us at 800-654-2593.

Our specialists are available Monday through Friday, 24 hours a day.



Log in to your account to chat online.

9 a.m.–9 p.m. Monday–Friday



Outside the U.S.?

If you live outside the U.S., visit the [Contact Us](#) page to find your country's local number or call **602-355-3408** to be connected with a Schwab representative.

HOW DO I OPEN MY SCHWAB ONE® BROKERAGE ACCOUNT?

Go to eac.schwab.com, click **Open an Account**, and follow the prompts.

Living outside the U.S.? Visit eac.schwab.com/overseas-employees.

For help, call Stock Plan Services at **800-654-2593** or at [an international phone number](#), or check out these videos for step-by-step instructions:

[How to Open Your Schwab Account](#) (United States)

[How to Open Your Schwab Account](#) (Non-U.S. accounts)

HOW DO I LOG IN TO MY SCHWAB ACCOUNT?

Go to eac.schwab.com, click **Log In** at the top of the screen, and follow the prompts.

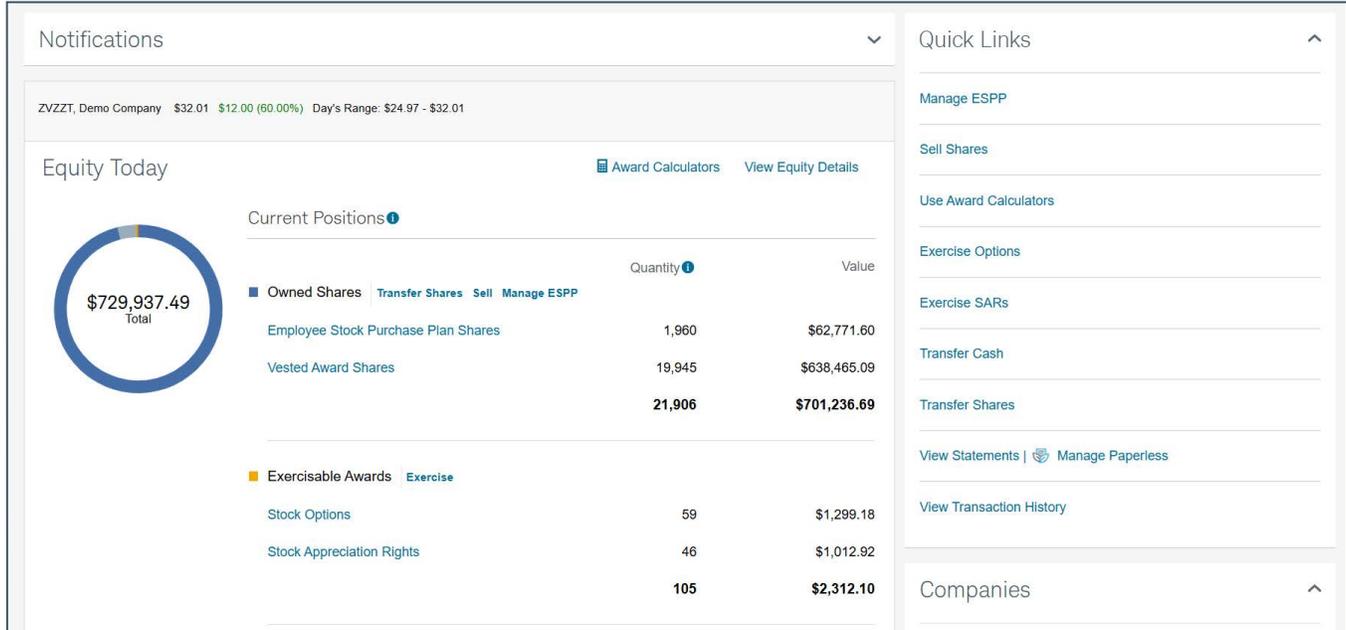
WHAT'S THE DIFFERENCE BETWEEN A SCHWAB BROKERAGE ACCOUNT AND THE EQUITY AWARD CENTER (EAC)?

The account you open is actually a Schwab One brokerage account. Your brokerage account is an investment account where you manage your equity. It's also where you can buy and sell stocks, bonds, mutual funds, and ETFs. Whether you're setting aside money for the future or saving up for a big purchase, you can use your funds from your brokerage account whenever and however you want.

Your profile on the EAC displays your employer-sponsored equity compensation awards and/or your employee stock purchase plan (ESPP) information. Your profile on the EAC is directly linked to your Schwab One brokerage account so you can find everything in one place.

WHERE CAN I GO TO GET MORE INFORMATION?

Head to our [Equity Education Hub](#) to learn more about your equity compensation.



HOW DO I GET TO THE EAC?

After logging in, select **Equity Awards** from the list of your accounts, or use the navigation bar at the top of each web page to access your awards, view vesting schedules, and place transactions with your awards.

To see details of your awards, you can click on each award type for more information.

HOW CAN I VIEW THE VALUE OF MY AWARD IN A DIFFERENT CURRENCY?

There is a dropdown menu above **Equity Today** called **Currency View**. You can select one of these options to view your award in another currency, although please note it is limited to showing non-transactional quotes. This means that anything tied to moving money will still show up in USD.

HOW DO I MAKE A TAX ELECTION?

Tax elections are ultimately determined by your employer. If you're able to make an election, from the **Accounts** page, go to **Equity Awards > View Equity Details > Tax Election**. If you don't see an option to adjust, the default election may be the only option.

All-In-One Trade Ticket

[Return to Classic View](#)

Account: **Equity Award Center** Language: **English (US)**

1. Select Symbol → 2. Choose Action → 3. Enter Order → 4. Verify Order

Quote

MARKET CLOSED Refresh Quote

Symbol	Current Price	Day's Range	Bid/Size	Ask/Size	Trading Volume
ZVZT	\$25.08/1 +\$12.00 (+59.97%)	\$24.97 - \$32.01	\$25.08/1	\$32.02/250	368,228

Action

Which type of transaction would you like to make?

Sell shares
Sell shares of company stock you own. Includes shares from restricted stock, employee stock purchase plans (ESPPs), dividend reinvestments, and performance stock.

Exercise stock options
Exercise your vested stock options. Involves 2 actions: exercising (buying) shares and deciding how many to sell, if any.

Exercise SARs
Exercise your vested stock appreciation rights (SARs).

Exercise type

What would you like to do with your shares after you buy them? Whatever you choose, you'll have to pay certain exercise costs. ⓘ

Sell shares
Sell all the shares you're exercising.

Hold, do not sell
Hold on to all the shares you're exercising. You can later sell your shares, just like any other stock you own.

Partial sell
Sell enough shares to cover your transaction costs and hold (do not sell) the rest.¹

[Cancel](#) [Back](#) [Continue](#)

HOW DO I EXERCISE STOCK OPTIONS?

1. Log in to your Schwab account.
2. Choose **Equity Awards** from the navigation bar on the **Accounts** page.
3. Select the green **Trade** button at the top right of the EAC dashboard, or you can select **Sell** or **Exercise in Equity Today**. You can also select **All-in-One Trade Ticket** under the **Trade** page.
4. On the All-in-One Trade Ticket, select the ticker you would like to trade (if there is more than one).
5. On the next page, choose your action to select which type of transaction you would like to make. In this case, you would select **Exercise stock options**.

6. Then select the exercise type (what you would like to do with your shares after buying them). See the “What are the different stock option exercise methods?” section below for additional details on each exercise type:
 - a. **Sell shares** (Sell all the shares you’re exercising.)
 - b. **Hold, do not sell** (Hold on to the shares you’re exercising. You can later sell your shares, just like any other stock you own.)
 - c. **Partial sell** (Sell enough shares to cover your transaction costs and hold—do not sell—the rest.)
7. Enter the quantity of options you want to exercise.
8. Choose a market or limit order.
 - a. If you’re placing a limit order, select the timing of your order: **Day Only** or **Good Until Canceled**. A Good Until Canceled order will remain in the system for 180 calendar days, at which point it will expire if the order has not executed. **It’s your responsibility to cancel the order if your company trading window closes during this time.**
9. Once you’ve entered all the details of your stock option exercise, select the **Review Order** button.
10. Now, verify your order. Confirm the instructions you entered, review any order messages that may be presented, and make any changes. From here, you can:
 - a. Select the **Cancel** button to cancel the order.
 - b. Select the **Back** button to go back a step and edit the order.
 - c. Select the **Place Order** button to place the order.
11. Once you place the order, your order confirmation will appear on the next screen along with a summary of the trade details. This message will include details of where to view your Order Status (**View Order Status** button) and explain how to change how you receive proceeds, if desired (**Transfer Proceeds** button).

WHAT ARE THE DIFFERENT STOCK OPTION EXERCISE METHODS?

1. **Sell shares:**
 - a. Use this method when you want to sell all your options for cash. The cost of exercise and any taxes will be removed from the proceeds, and the net proceeds from the rest of your shares will be deposited into your Schwab One® brokerage account.
2. **Hold, do not sell:**
 - a. Use this method when you want to own shares in your company’s stock. You’ll need to have the funds to pay the exercise price. If these are nonqualified stock options, you’ll also need to pay taxes on the spread at the time of exercise. Shares will be deposited into your Schwab One brokerage account.
3. **Partial sell:**
 - a. Use this method when you want to own shares in your company’s stock but don’t have enough funds to pay the exercise costs out of pocket. You must sell enough shares to pay the costs, and the net proceeds from the rest of the shares will be deposited into your Schwab One brokerage account.

The screenshot displays the Schwab Equity Today dashboard for a user. At the top, there's a 'Notifications' dropdown and a 'Quick Links' section. The main area shows 'Equity Today' for 'ZVZZT, Demo Company' with a stock price of \$32.01 and a 60.00% change. A circular gauge shows a total value of \$729,937.49. Below this, there are two sections: 'Owned Shares' and 'Exercisable Awards'. The 'Owned Shares' section includes a table with columns for 'Quantity' and 'Value'. The 'Exercisable Awards' section includes a table with columns for 'Quantity' and 'Value'. The 'Quick Links' section on the right includes 'Manage ESPP', 'Sell Shares', 'Use Award Calculators', 'Exercise Options', 'Exercise SARs', 'Transfer Cash', 'Transfer Shares', 'View Statements | Manage Paperless', and 'View Transaction History'. The 'Companies' section is also visible at the bottom right.

Category	Item	Quantity	Value
Owned Shares	Employee Stock Purchase Plan Shares	1,960	\$62,771.60
	Vested Award Shares	19,945	\$638,465.09
	Total	21,906	\$701,236.69
Exercisable Awards	Stock Options	59	\$1,299.18
	Stock Appreciation Rights	46	\$1,012.92
	Total	105	\$2,312.10

HOW DO I ENROLL IN MY COMPANY'S ESPP?

Log in to your Schwab One® brokerage account and choose **Equity Awards** from the navigation bar on the **Accounts** page. There are two ways to enroll: when your company has open enrollment or when you are eligible to enroll in an ESPP plan.

- You will see a message in the **Notification Center** and can use the **Enroll** button to start the process.
- Select **Manage ESPP** in **Equity Today** on your EAC dashboard.
- Follow the prompts for enrollment.

WHERE CAN I SEE HOW MUCH I'VE CONTRIBUTED TOWARD THE NEXT ESPP PURCHASE?

The best way to see your contributions prior to the purchase date is to review your paycheck stub. This will show ESPP contributions that have been deducted. Contributions may also be displayed on your EAC dashboard, depending on the frequency with which your employer provides the information to Schwab.

To review the details on your EAC dashboard, navigate to **Equity Today**, select **Manage ESPP**, and click **Contribution History**. You can use the **View** link on that page to navigate directly to the ESPP details page.

HOW DO I CHANGE MY ESPP CONTRIBUTION ELECTION?

Please note that some companies may limit your changes. You may not be able to make changes, or you may only be able to decrease your contributions or make a withdrawal. If this is the case, you'll need to wait for an open enrollment window to make changes for subsequent ESPP offerings. If you have questions, Schwab or your HR department can help.

If you can make changes to your contribution, navigate to **Equity Today** on the EAC dashboard, select **Manage ESPP**, and click the **Change** button. Here, you'll be able to change your contribution type (Percentage, Amount, or Shares) and enter a new contribution rate to complete the process. Follow the prompts to complete the update.

All-In-One Trade Ticket

[Return to Classic View](#)

Account: **Equity Award Center** Language: **English (US)**

1. Select Symbol 2. Choose Action 3. Enter Order 4. Verify Order

Quote

MARKET CLOSED [Refresh Quote](#)

Symbol	Current Price	Day's Range	Bid/Size	Ask/Size	Trading Volume
ZVZZT	\$25.07/2 +\$12.00 (+59.97%)	\$24.97 - \$32.01	\$25.07/2	\$126.00/36	368,388

Action

Which type of transaction would you like to make?

- Sell shares**
Sell shares of company stock you own. Includes shares from restricted stock, employee stock purchase plans (ESPPs), dividend reinvestments, and performance stock.
- Exercise stock options**
Exercise your vested stock options. Involves 2 actions: exercising (buying) shares and deciding how many to sell, if any.
- Exercise SARs**
Exercise your vested stock appreciation rights (SARs).

Award types¹

Which awards would you like to sell? Select 1 or more.

Vested award shares
Restricted stock and performance stock that vested and converted to shares of company stock. You own and can sell these shares.
Available quantity: 19,924
Total market value: \$637,767.24

Dividend reinvestments
Shares of company stock that were bought with dividends from your previous award shares. You own and can sell these shares.
Available quantity: 21.801
Total market value: \$697.85

Employee stock purchase plan
Shares of company stock that you bought through your company-run employee stock purchase plan (ESPP). You own and can sell these shares.
Available quantity: 1,960.9997
Total market value: \$62,771.60

[Cancel](#) [Back](#) [Continue](#)

HOW DO I SELL MY ESPP SHARES?

1. Log in to your Schwab account.
2. Choose **Equity Awards** from the navigation bar on the **Accounts** page.
3. Select the green **Trade** button at the top right of the EAC dashboard, or you can select **Sell** or **Exercise** in **Equity Today**. You can also select **All-in-One Trade Ticket** under the **Trade** page.
4. On the All-in-One Trade Ticket, select the ticker you would like to trade (if there is more than one).

Employee stock purchase plans (ESPPs)

[Return to table of contents](#)

5. On the next page, choose your action to select which type of transaction you would like to make. In this case, you would select **Sell shares**. Then select the type of award you would like to sell, if there is more than one.
6. Enter the quantity of shares you want to sell.
7. Choose a market or limit order.
 - a. If you're placing a limit order, select the timing of your order: **Day Only** or **Good Until Canceled**. A Good Until Canceled order will remain in the system for 180 calendar days, at which point it will expire if the order has not executed. **It's your responsibility to cancel the order if your company trading window closes during this time.**
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Note: Your company may have specific guidelines around when you can sell your shares. Review your company's trading policy for more information.

Restricted stock awards (RSAs) and restricted stock units (RSUs)

[Return to table of contents](#)

Vested Award Shares

Total Market Value ⁱ
\$638,465.09

[Award Calculators](#) [Transfer Shares](#) [Sell](#)

Award Date	Symbol	Award ID	Share Type	Market Value	Date Holding Period Met	Deposit Date	Date Acquired	Acquisition Price	Shares	Available to Sell
N/A	ZVZZT	4337	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	3341	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	18.E 2	Restricted Stock	\$18,021.63	N/A	02/07/2025	01/10/2024	\$20.00	563	563
N/A	ZVZZT	18.E 2	Restricted Stock	\$18,021.63	N/A	02/07/2025	01/10/2024	\$20.00	563	563
N/A	ZVZZT	3341	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	4337	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	18.E 2	Restricted Stock	\$18,021.63	N/A	02/07/2025	01/10/2024	\$20.00	563	563
N/A	ZVZZT	3341	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	4337	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	4337	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/31/2024	\$100.00	500	500
N/A	ZVZZT	18.E 2	Restricted Stock	\$18,021.63	N/A	02/07/2025	01/31/2024	\$20.00	563	563
N/A	ZVZZT	3341	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/31/2024	\$100.00	500	500
N/A	ZVZZT	18.E 2	Restricted Stock	\$18,021.63	N/A	02/07/2025	01/31/2024	\$20.00	563	563
N/A	ZVZZT	3341	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/31/2024	\$100.00	500	500

WHERE DO I FIND MY VESTED RSA/RSU SHARES?

Vested RSA/RSU shares are held in your Schwab One® brokerage account. Log in to your Schwab One brokerage account and choose **Equity Awards** from the navigation bar on the Accounts page. On the EAC dashboard in **Equity Today**, you can view your **Vested Award Shares** in the Current Positions donut chart.

To view fully vested awards (awards with zero shares outstanding), click on the **Vested Award Shares** link in **Equity Today**, and on the details page select the option to **Show All Historical Awards**. Your vested share quantity may not match the gross quantity in your grant agreement. When your restricted stock vests, this is considered income at the time of vesting and shares are withheld to cover this tax obligation.

HOW DO I ACCEPT A GRANT?

There are two ways to accept a grant once the grant agreement is available:

- You will see a message in the **Notification Center** if there is a new award to review and accept. It will show a summary of the award, as well as a button to begin the acceptance process.
- Select **View Equity Details** on the EAC dashboard and click on the **Grant Agreement Status** for the award.

Follow the prompts for acceptance.

All-In-One Trade Ticket

[Return to Classic View](#)

Account

Equity Award Center

Language

English (US)

1. Select Symbol
2. Choose Action
3. Enter Order
4. Verify Order

Quote MARKET CLOSED [Refresh Quote](#)

Symbol	Current Price	Day's Range	Bid/Size	Ask/Size	Trading Volume
ZVZT	\$25.07/2 +\$12.00 (+59.97%)	\$24.97 - \$32.01	\$25.07/2	\$126.00/36	368,388

Action

Which type of transaction would you like to make?

Sell shares
Sell shares of company stock you own. Includes shares from restricted stock, employee stock purchase plans (ESPPs), dividend reinvestments, and performance stock.

Exercise stock options
Exercise your vested stock options. Involves 2 actions: exercising (buying) shares and deciding how many to sell, if any.

Exercise SARs
Exercise your vested stock appreciation rights (SARs).

Award types¹

Which awards would you like to sell? Select 1 or more.

Vested award shares

Restricted stock and performance stock that vested and converted to shares of company stock. You own and can sell these shares.

Available quantity	19,924
Total market value	\$637,767.24

Dividend reinvestments

Shares of company stock that were bought with dividends from your previous award shares. You own and can sell these shares.

Available quantity	21.801
Total market value	\$697.85

Employee stock purchase plan

Shares of company stock that you bought through your company-run employee stock purchase plan (ESPP). You own and can sell these shares.

Available quantity	1,960.9997
Total market value	\$62,771.60

[Cancel](#)
Back
Continue

HOW DO I SELL MY VESTED RSA/RSU SHARES IN A SCHWAB BROKERAGE ACCOUNT?

1. Log in to your Schwab account.
2. Choose **Equity Awards** from the navigation bar on the **Accounts** page.
3. Select the green **Trade** button at the top right of the EAC dashboard, or you can select **Sell** or **Exercise** in **Equity Today**. You can also select **All-in-One Trade Ticket** under the **Trade** page.
4. On the All-in-One Trade Ticket, select the ticker you would like to trade (if there is more than one).

Restricted stock awards (RSAs) and restricted stock units (RSUs)

[Return to table of contents](#)

5. On the next page, first choose your action to select which type of transaction you would like to make. In this case, you would select **Sell shares**. Then select the type of award you would like to sell, if there is more than one.
6. Enter the quantity of vested award shares you want to sell.
7. Choose a market or limit order.
 - a. If you're placing a limit order, select the timing of your order: **Day Only** or **Good Until Canceled**. A Good Until Canceled order will remain in the system for 180 calendar days, at which point it will expire if the order has not executed. **It's your responsibility to cancel the order if your company trading window closes during this time.**
8. Once you've entered all the details, select the **Review Order** button.
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 - b. Select the **Back** button to go back a step and edit the order.
 - c. Select the **Place Order** button to place the order.
10. Once you place the order, your order confirmation will appear on the next screen along with a summary of the trade details. This message will include details of where to view your Order Status (**View Order Status** button) and explain how to change how you receive proceeds, if desired (**Transfer Proceeds** button).

Employee Stock Purchase Plan Shares

Total Market Value ⓘ
\$62,771.60

[Award Calculators](#)

[Transfer Shares](#) [Sell](#)

ⓘ ESPP table info

▼ Purchase Date	Symbol	Market Value	Deposit Date	Purchase Price	Date Holding Period Met	Available to Sell
▶ 11/25/2024	ZVZZT	\$1,632.51	02/07/2025	\$7.77	11/26/2024	51
▶ 11/20/2024	ZVZZT	\$1,632.51	02/07/2025	\$7.77	11/21/2024	51
▶ 10/15/2024	ZVZZT	\$1,632.51	02/07/2025	\$7.77	10/16/2024	51
▶ 03/31/2024	ZVZZT	\$7,874.46	05/20/2024	\$8.51	01/02/2026	246
▶ 05/15/2020	ZVZZT	\$1,984.62	04/06/2021	\$86.41	Qualified	62
▶ 01/31/2017	ZVZZT	\$38,976.88	02/26/2020	\$4.25	Qualified	1,217.6469
▶ 06/30/2015	ZVZZT	\$9,038.11	04/14/2016	\$3.54	Qualified	282.3528
Totals						1,960.9997

Vested Award Shares

Total Market Value ⓘ
\$638,465.09

[Award Calculators](#)

[Transfer Shares](#) [Sell](#)

Award Date	Symbol	Award ID	Share Type	Market Value	Date Holding Period Met	▼ Deposit Date	Date Acquired	Acquisition Price	Shares	Available to Sell
N/A	ZVZZT	4337	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	3341	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	18.E 2	Restricted Stock	\$18,021.63	N/A	02/07/2025	01/10/2024	\$20.00	563	563
N/A	ZVZZT	18.E 2	Restricted Stock	\$18,021.63	N/A	02/07/2025	01/10/2024	\$20.00	563	563
N/A	ZVZZT	3341	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500
N/A	ZVZZT	4337	Restricted Stock	\$16,005.00	N/A	02/07/2025	01/10/2024	\$100.00	500	500

HOW DO I FIND THE COST BASIS DETAILS FOR MY RSA/RSU SHARES?

Log in to your Schwab One® brokerage account and choose **Equity Awards** from the navigation bar on the **Accounts** page. On the EAC dashboard in **Equity Today**, select the **View Equity Details** button. From there, you can see the date purchased and the purchase price.

HOW DO I FIND THE COST BASIS DETAILS FOR MY ESPP SHARES?

Log in to your Schwab One brokerage account and choose **Equity Awards** from the navigation bar on the **Accounts** page. On the EAC dashboard in **Equity Today**, select the **View Equity Details** button. From there, you can see the date purchased and the purchase price.

HOW DO I UPDATE MY COST BASIS?

If you believe the cost basis for a covered security is incorrect, please contact Schwab. If you can supply paperwork supporting a different cost basis, Schwab's cost basis team may be able to make the update for you. Contact Stock Plan Services at **800-654-2593** for additional details.

If you live outside the U.S., visit the [Contact Us](#) page to find your country's local number or call **602-355-3408** to be connected with a Schwab representative.

Where to find order status, transaction history, account statements, and forms

[Return to table of contents](#)

Order Status

Account: **Equity Award Center** Language: **English (US)**

Orders

All | Open | Fills | Today's | Canceled

Symbol	Status	Order/Fill Details	Quote Get all quotes	Order Date	Order Number	Transfer Method	Trading Actions
▶ ZVZZT Demo Company	Closed Expired	Sell 1 ZVZZT @ LIMIT \$12.11, Day Only	Get quote	03/05/2025	523527913500		
▼ ZVZZT Demo Company	Closed Awaiting settlement	Hold 2 ZVZZT	Get quote	03/03/2025			

Award type	Award ID	Award date	Exercise price	Hold quantity
NQ	S_ZVZZT1367	08/26/2016	\$1.35	1
NQ	S_ZVZZT1404	05/12/2016	\$4.98	1

WHERE DO I FIND MY ORDER STATUS?

There are three ways to view a list of your orders, as well as the details of each order:

- Log in to your Schwab One® brokerage account and choose **Equity Awards** from the navigation bar on the **Accounts** page. Select the **Order Status** button on the top right of the screen (located next to the green **Trade** button).
 - Alternatively, from the **Equity Details** page, select the **Order Status** button on the top right of the screen (located next to the green **Trade** button).
- Click on the **Trade** page from the navigation bar, then select **Order Status** to view your orders.

Where to find order status, transaction history, account statements, and forms

[Return to table of contents](#)

Transaction History

Equity Award Center

Date range: Last 6 Months

Symbol (Optional):

Search

Filter by Transaction Types

Transactions found from 09/21/2024 to 03/21/2025

Don't see it here? [Go to Statements](#)

Date	Action	Symbol / Description	Quantity	Fees & Comm	Disbursement Election	Amount
02/07/2025	Deposit Details	ZVZZT RS	500			
02/07/2025	Deposit Details	ZVZZT RS	500			
02/07/2025	Deposit Details	ZVZZT RS	500			
02/07/2025	Deposit Details	ZVZZT RS	500			
02/07/2025	Deposit Details	ZVZZT RS	500			
02/07/2025	Deposit	ZVZZT	563			

WHERE DO I SEE HISTORICAL TRANSACTIONS?

There are two ways to view a list of your historical transactions:

- Log in to your Schwab One® brokerage account and choose **Transaction History** from the navigation bar on the **Accounts** page.
- Log in to your Schwab One brokerage account and choose **Equity Awards** from the navigation bar on the **Accounts** page. Select the **View Transaction History** button on the right side of the screen.

Use the dropdown menu to select the account whose history you want to view, and then select your date range. You can also filter by symbol.

Where to find order status, transaction history, account statements, and forms

[Return to table of contents](#)

The screenshot displays the Charles Schwab website interface. At the top, there is a navigation bar with links for Accounts, Trade, Research, Move Money, Products, Learn, and How To. Below this is a secondary navigation bar with links for Summary, Balances, Positions, Realized Gain / Loss, Investment Income, Equity Awards, Portfolio Performance, Securities Lending, Corporate Actions, and Transaction History. The main content area is titled "Statements" and includes a sub-section for "Equity Award Center". Below this, there is a "1099 Dashboard" section with a description of the dashboard and a list of links for Tax FAQs, Tax Guide, Tax Software Imports, and Paperless Preferences. The "Charles Schwab Brokerage Tax Forms" section shows a message: "No documents. There are no documents to show. When documents are available, they'll be listed here." Below this is a "Statements and Documents" section with a search filter for "Date range" (Year to Date) and "Document Types" (Statements, Tax Forms, Letters, Reports & Plans, Trade Confirms). The search results show "0 document(s) found from 01/01/2025 to 03/21/2025" and a message: "No documents found. There are no documents available for your search criteria. Modify your search selections and try again." The Charles Schwab logo is visible in the top left corner, and the SnapTicket logo is visible in the bottom right corner of the screenshot.

WHERE DO I FIND STATEMENTS AND TAX FORMS?

There are two ways to view your statements and tax forms:

- Log in to your Schwab One® brokerage account and choose **Statements & Tax Forms** from the navigation bar on the **Accounts** page.
- Log in to your Schwab One brokerage account and choose **Equity Awards** from the navigation bar on the **Accounts** page. Select the **View Statements** button on the right side of the screen.

Use the dropdown menu to select the account whose statements and forms you would like to view. Then click on the document types you are searching for, indicate the date range, and select **Search**.

The screenshot shows the Charles Schwab website's 'Move Money' section. The navigation bar includes 'Accounts', 'Trade', 'Research', 'Move Money', 'Products', 'Learn', and 'How To'. Below the navigation, there are links for 'Transfers & Payments', 'Recent Transfer Activity', 'Online Transfer', 'External Accounts', 'Send Wire', 'Pay Bills', 'Request Check', and 'Transfer Account'. The main content area is titled 'Transfers & Payments' and features several cards for different transfer methods:

- Manage recurring and recent transfers**
- Online Transfers** (Most Used): Cash transfers between internal and/or external (non-Schwab) bank accounts. Positions are only between Schwab brokerage accounts. Estimated arrival: Same business day (between internal accounts) or 1-2 business days (with external bank accounts).
- Send a Wire**: Wire transfers are the fastest way to send money from your account to another financial institution. Fees apply. Estimated arrival: Same business day (domestic) or 2-7 business days (international).
- Pay Bills**: Pay bills and people securely, schedule automated payments, and receive your bills online. Estimated arrival: 1-5 business days.
- Transfer an Account**: Move investments from another financial institution, such as a brokerage or mutual fund company, into your Schwab account. Estimated arrival: 5-16 business days.
- Request a Check**: Withdraw money from your account and have it sent to you as a check by mail. Fees apply to overnight delivery. Estimated arrival: 6-9 business days (standard) or 1 business day (overnight).

Additional sections include 'External Bank Accounts' (with links to link/delete accounts and verify trial deposits), 'Send Money With Zelle' (describing it as a fast and easy way to send money), and a 'NEW' banner asking for feedback.

HOW DO I MOVE MONEY TO OR FROM MY SCHWAB ACCOUNT?

From the navigation bar on the **Move Money** page, select **Transfers & Payments**. There are several ways to manage cash in your account, including:

- Use Schwab MoneyLink® to conduct a safe electronic transfer of funds between Schwab and your bank, credit union, or other financial institution (U.S. only).
- Send a wire. Wire transfers are the fastest way to send money from your account to another financial institution. Fees apply.
- Request a check. Withdraw money from your account or have it sent to you as a check by mail. Standard delivery is 6-9 business days in the U.S. Fees may apply to overnight delivery.
- Deposit a check into your Schwab brokerage account with our Schwab Mobile app, at a nearby branch, or through the mail.

Some transaction types may not be available if you live outside the U.S. For more information, please review the menu of [Moving Money](#) options.

Let us help you.

Our team is here for you Monday through Friday, 24 hours a day, to answer questions and connect you with equity award, equity compensation, and wealth management professionals.

Call us at **800-654-2593**, or get a toll-free international number at eac.schwab.com/contact-us.

Send us a secure message or chat after you're logged in.



Stock Plan Services provides equity compensation plan services and other financial services to corporations and employees through Charles Schwab & Co., Inc. ("Schwab"). Schwab, a registered broker-dealer, offers brokerage and custody services to its customers.

The information provided here is for general informational purposes only, and is not intended to be a substitute for specific individualized tax, legal, or investment planning advice. Where specific advice is necessary or appropriate, you should consult with a qualified tax advisor, CPA, Financial Planner, or Investment Manager.

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