



## Charles Schwab BillPay Service Setup

To start the process of enrolling in Schwab's BillPay service, please navigate to Schwab Alliance, either through our website or directly to [www.schwaballiance.com](http://www.schwaballiance.com)

Then login to the site with your Login ID and Password.

Select Transfers and Payments...

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### Signature Alliance Login

A premium service designed to complement the expertise and the personal advice of your advisor.

Login ID  [New User?](#)  
 Password  [Forgot your Password?](#)  
 Start Page: Accounts Summary   
 Save as your start page

[SchwabSafe](#)  
  
[The Schwab Security Guarantee](#)

[Web Browser Information](#)

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[Accounts](#) [Trade](#) [Research](#) [Products](#) [Specialty](#) [Service](#) [Messages](#) [Contact Us](#)  
[Summary](#) [Balances](#) [Positions](#) [History](#) [Transfers & Payments](#) [Message Center](#)

Accounts Summary

All Schwab Accounts Select an Account: [Show All Schwab Accounts](#)

All Brokerage Accounts

Total Accounts Value*	Total Cash & Cash Investments	Total Market Value	Day
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and then,  
Bill Pay

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Transfers & Payments

[Online Transfers](#) [Wire Funds](#) [Check Request](#) [Bill Pay](#) [Add External Account](#)

Please make sure your amount does not exceed your available balance.

Online Transfers

1. Setup 2. Submit 3. Acknowledgment

From:  Balances: Cash \$0.00  
Cash + Borrowing \$0.00

To:  Balances: Cash \$0.00  
Cash + Borrowing \$0.00



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Accounts Trade Research Products Specialty Service Messages Contact Us Enter keyword  
Summary Balances Positions History Transfers & Payments Message Center

**Transfers & Payments**

Online Transfers Wire Funds Check Request **Bill Pay** Add External Account

**Bill Pay**

Charles Schwab Bank

Launch Schwab Bank Bill Pay for your Investor Checking accounts. [View Schwab Bank Bill Pay Demo](#)

**Continue**

If you are not currently enrolled in Schwab Bank Bill Pay, please contact Schwab Bank Bill Pay Customer Service at 888-297-7535.

Charles Schwab Brokerage

Launch Schwab BillPay® for your Schwab One accounts. [View Schwab BillPay Demo](#)

**Log In**

If you are not currently enrolled in Schwab BillPay®, please complete an [enrollment form](#).

To enroll in BillPay click on "enrollment"...

You should now be viewing the following page

**Schwab BillPay® Overview**

[View Forms List](#)

**Account Selector:**

Select a Brokerage Account

[Enroll Online](#) or [Download Form](#)

With Schwab BillPay®, you can use your Schwab One® account to:

**Pay virtually anyone in the U.S.**

Make payments to your credit card company, your gardener or your daughter in college.

**Request one-time or recurring payments**

Make one-time payments or set up an ongoing payment schedule for monthly bills such as your mortgage or car loan.

**Receive bills online**

Receive bills online from a growing list of local and national billers. Receiving and paying bills from the same account gives you maximum control over your finances.

[View the Schwab BillPay demo](#)

Schwab BillPay is free. See the [Schwab BillPay terms and conditions](#) for more information.

**Looking to enroll in Schwab Bank Bill Pay?**

If you are a Schwab Bank client looking to enroll in the Schwab Bank Bill Pay service, please contact Schwab Bank Bill Pay Customer Service at 888-297-7535.

Schwab BillPay is not available for certain accounts such as business, corporate, trust (except living trust), estate, custodial, international, or IRA accounts.

Remember: Your Schwab One account is intended to serve primarily as an investment account.



Simply select an eligible account for Schwab Bill Pay and then “Enroll Online”.

Not sure if the account is eligible? Don’t worry; you will receive this message if the account is not.

### **Schwab BillPay® Overview**

[View Forms Lis](#)

**The account you have selected is not eligible for Schwab BillPay®.**

Please select an eligible account. Schwab BillPay is not available for certain accounts, such as business, corporate, trust (except living trust), estate, custodial, international, and IRA accounts.

You can use your Schwab One® account to sign up for the Schwab BillPay service.

If you have additional questions, contact Schwab at 888-297-7535.

Finally, agree to the Terms & Conditions and Schwab will send to you a PIN. Please remember to retain this PIN for your records.

While you will be able to set a new PIN (Password), if you ever need to reset your password, the default will go back to the PIN you were sent.

Once completed, you can login and begin using the BillPay Service. For a more complete walkthrough of setting up payments and using the service, please visit the “Payment Setup” link also found in this section.