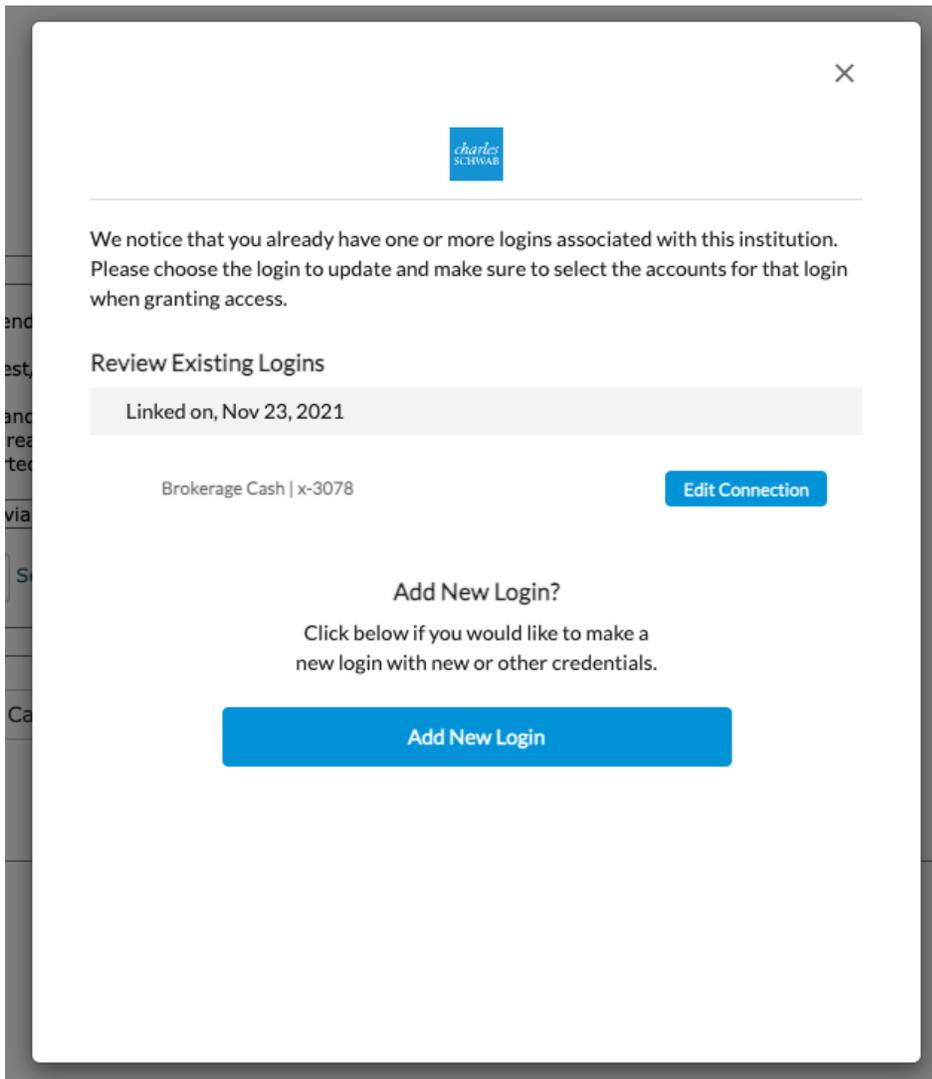


Yodlee Setup Instructions

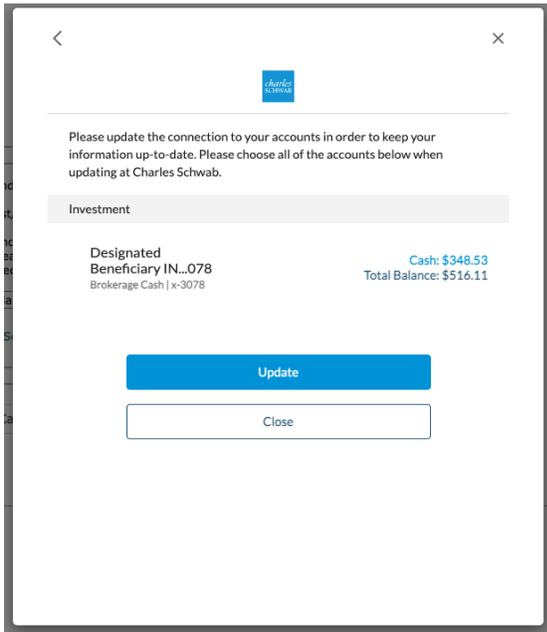
The Yodlee connection process has changed. Follow these steps to reconnect your Schwab/Yodlee account.

Step 1 - Clubs can reconnect by selecting "Unlink Account" and then Linking their Schwab/Yodlee account.

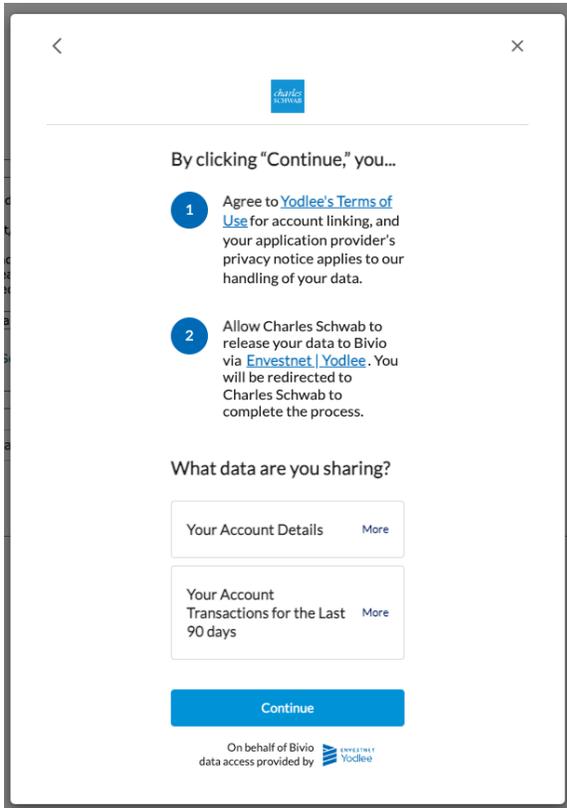
Step 2 - Yodlee may recognize that you have linked an account in the past. In this case select "Edit Connection".



Step 3 - Select Update account



Step 4 - Select Continue



Step 5 - Log into Schwab

Charles Schwab Log In Help

Log In

Login ID

Password

Log in

Forgot Password?

This site supports Microsoft Edge, Google Chrome, and Mozilla Firefox.
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Step 6 - Agree to the consent form

Consent and Grant | Charles Schwab

Instruction and Informed Consent to Allow Third-Party Bivio Access to Your Account Information

Please read the following and provide consent to the terms and conditions. By clicking Continue, you authorize Schwab to grant access to and share the following data with Bivio.

Updated: January 13, 2022

Your Instruction to Schwab and Informed Consent. On this page you can instruct Charles Schwab & Co., Inc. and its affiliates ("Schwab," "we," or "us") to provide access to your Schwab account information ("Account Information") to a third party, such as a non-Schwab firm providing financial applications, computer software or other programs (each a "Third Party Provider") used to provide data aggregation or other services to you (collectively, these services referred to as the "Services").

By instructing us to permit a Third Party Provider access to your Account Information and by clicking "Continue" below, you are agreeing to the terms and conditions set forth herein and providing your informed consent. You are accepting the responsibilities and risks associated with this instruction, including those summarized below. We may change, suspend, or cancel this instruction at any time.

We reserve the right to amend or update these terms and conditions at any time, with or without notice, and such amended or updated terms and conditions shall automatically apply and be posted on our website at: <https://www.schwab.com/legal/third-party-terms>.

The Account Information You Will Be Sharing. For each Schwab account, including brokerage, loan, line of credit, retirement account, and/or deposit account, that you instruct us to allow a Third Party Provider to access, you are authorizing Schwab to allow that Third Party Provider to access and use your Account Information, including the following categories and elements:

- Account descriptors, holdings, balances, transaction history (such as buys, sells, journals, dividends, commissions and fees, payments, interest, ATM Activity, adjustments, deposits, withdrawals, transfers, checks, taxes, and corporate actions).
- Information that may be considered to be personally identifiable information (which means information relating to individuals (such as you) who can be identified or who are identifiable, directly or indirectly, from the information), including name, address, email, and phone number.
- Other account details and information, such as routing and account number, data utilized to validate account ownership and move money out of your account or for other account transactions, and investment, checking, and savings account statements.

Schwab does not customize the Account Information a Third Party Provider can use and access, which means the amount and type of Account Information available to such Third Party Provider may be greater (or less) than is necessary for the Third Party Provider to provide the Services.

We will not share your Social Security Number or Schwab account login credentials (specifically, your IDs and passwords). You should safeguard the foregoing and you should never share your Schwab account access information with anyone, including with a Third Party Provider.

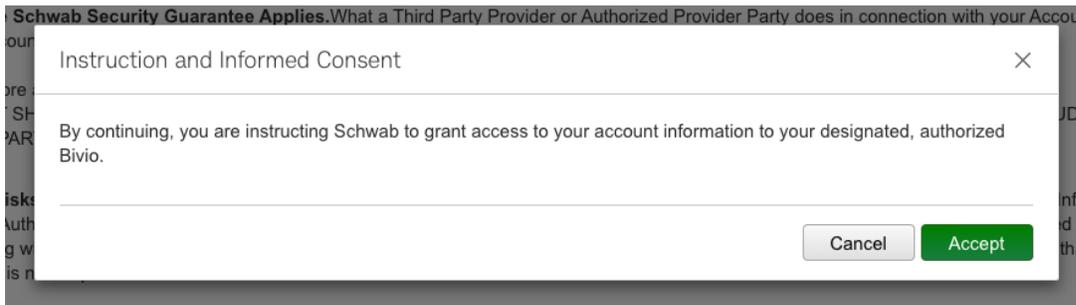
Third Party Provider And Those They Share Your Account Information With Are Your Authorized Persons. You agree that by instructing us to grant a Third Party Provider access to your Account Information, you are authorizing any and all actions that the Third Party Provider undertakes as a result, including how a Third Party Provider uses, shares, or otherwise acts on your Account Information, even if you did not anticipate such actions. This includes actions by the Third Party Provider's employees and agents, and the actions of any financial apps or other entities the Third Party Provider does business with and/or shares your Account Information (referred to as "Authorized Provider Party"). You understand that allowing access to and the use of Account Information could potentially expose you to increased privacy and security risks, including unauthorized account transactions, loss of funds, identity theft, fraud, and unauthorized disclosure or compromise of your Account Information.

How the Schwab Security Guarantee Applies. What a Third Party Provider or Authorized Provider Party does in connection with your Account and your Account Information is authorized by you, so the Schwab Guarantee does not apply to their actions.

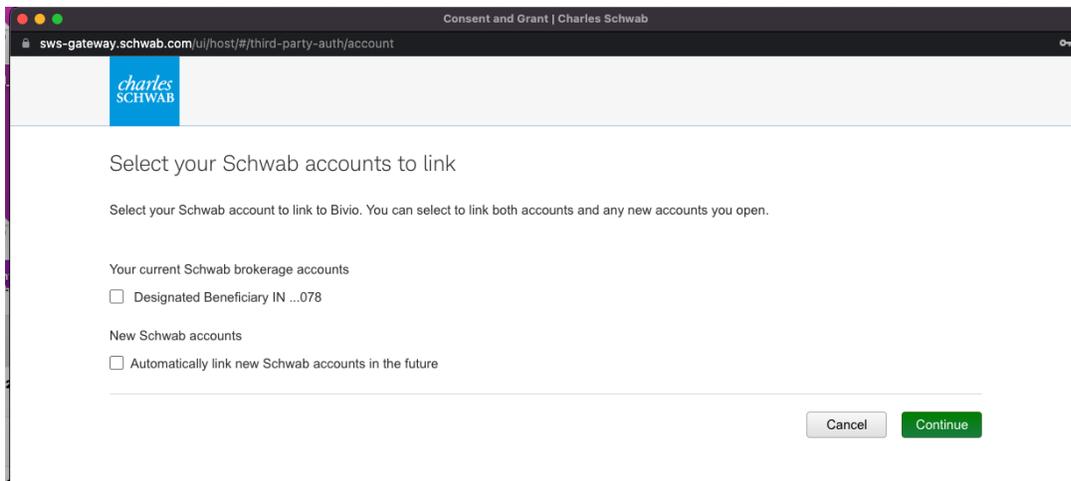
Read more about the Security Guarantee here: <https://www.schwab.com/schwabsafe/security-guarantee>.
DO NOT SHARE YOUR SCHWAB ACCOUNT ACCESS INFORMATION, INCLUDING LOGIN ID OR PASSWORD, WITH ANYONE (INCLUDING ANY THIRD PARTY PROVIDER OR THROUGH A NON-SCHWAB APPLICATION). THE SECURITY GUARANTEE WILL NOT APPLY.

Some Risks of Allowing Data Access. Once the Third Party Provider has accessed your Account Information and/or shared the Account Information with an Authorized Provider Party, we cannot retrieve it for you, and we are no longer responsible for how the Account Information is

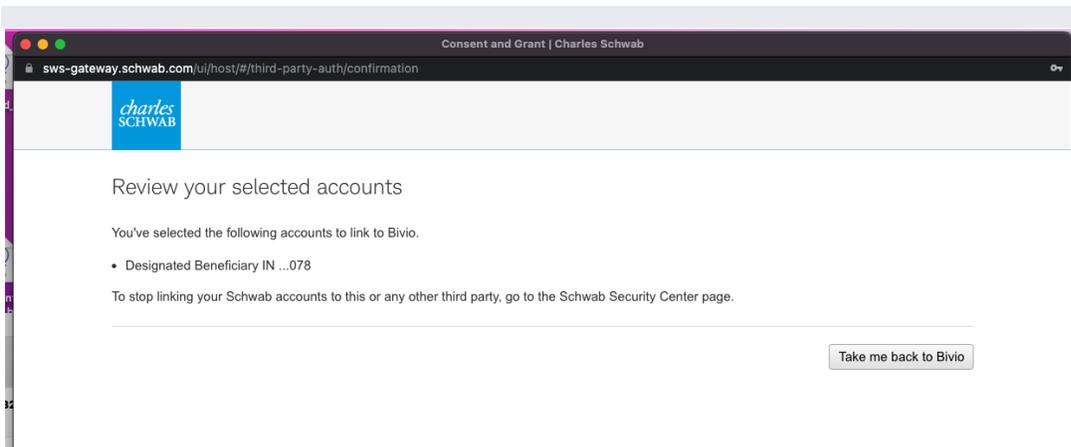
Step 7 - Really agree to the consent form - select Accept



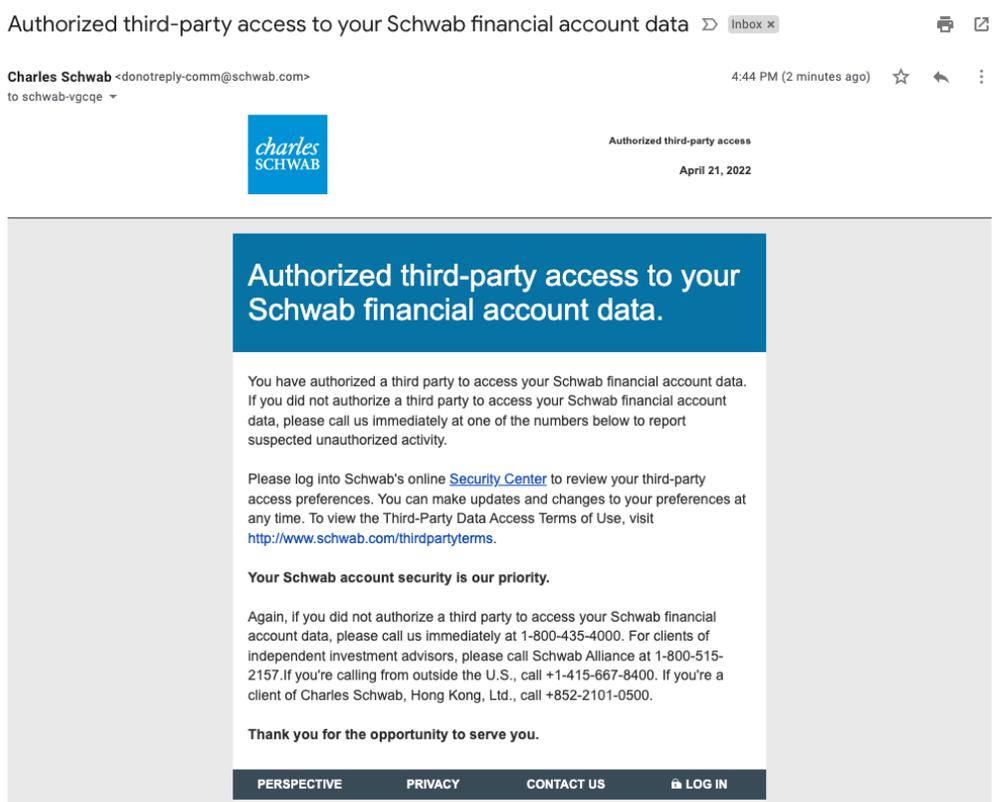
Step 8 - Select the checkbox for the brokerage account and select Continue



Step 9 - Done - Select Take me back to Bivio



Step 10 - Then enter the brokerage account number on the bivio page and select OK. The club treasurer will also receive an email from Schwab:



If you unlink the account, you will go through the same steps the next time.

After the next AccountSync update, check to see if your Schwab transactions were imported. AccountSync updates overnight after each business day.