

Schwab

Tax Withholding Election Form

Minimum Requirements

1. List account holder(s) information in Section 1
 - a. Type of Schwab Account
 - b. First Name, Middle Initial and Last Name
 - c. Schwab Account Number
 - d. Social Security Number of Client
 - e. Phone Number of Client
 - f. Legal Address of Client (No. P.O. Boxes)
2. Indicate if Federal Income Tax is to be withheld and at what percentage in Section 2
3. Indicate if State Income Tax is to be withheld and at what percentage in Section 2
4. Client must Sign/Print Name and Date in Section 3
5. Return completed and signed form to scoperations@marinerwealthadvisors.com.

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Frequently Asked Questions

