Advisor Services

Schwab Alliance

An online and mobile platform designed exclusively for clients of independent advisors

Serve clients efficiently, securely, and virtually

Whether your clients are online or on the go, the Schwab Alliance website and Schwab Mobile app keep them connected to their accounts, to your firm, and to you. The site can be customized to feature your firm's branding, and it gives your clients the ability to access their account information, make simple updates such as address changes, and approve requests initiated by you. It's the fastest, most secure way for you and your clients to take care of business.

Unlock the benefits of Schwab Alliance

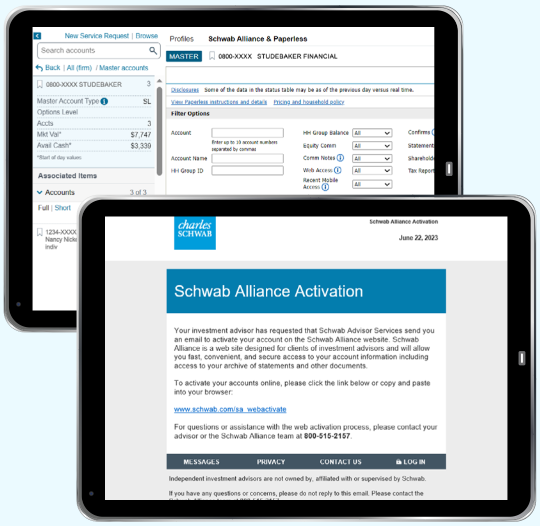
Schwab Alliance is the key to harnessing the benefits of digital workflows for you and your clients. Once clients enroll, your team can spend less time completing documents, chasing down signatures, and following up on tasks. That means more time to focus on supporting clients and winning new business.

With enrollment, your clients can:

- Access account information and up to 10 years of account documents
- Complete simple account updates, including address changes or adding beneficiaries and trusted contacts
- Securely approve requests initiated by you
- Deposit checks or set up a Schwab MoneyLink® with outside accounts that clients want to connect to their Schwab accounts
- Aggregate outside account information to get a more holistic view of their finances
- Offer view-only access to a spouse or other trusted professionals

Get to know Schwab Alliance

Our Schwab Alliance educational resources will prepare you to answer client questions before, during, and after the sign-up process. View a demo of the platform or dive deeper into the features through our online classes on RIA EdCenter™. You can also visit the Client Learning Center, an easy-to-use site that shows clients how to use Schwab Alliance to access account information, approve requests, and make simple updates. Bookmark the site and share it with clients.

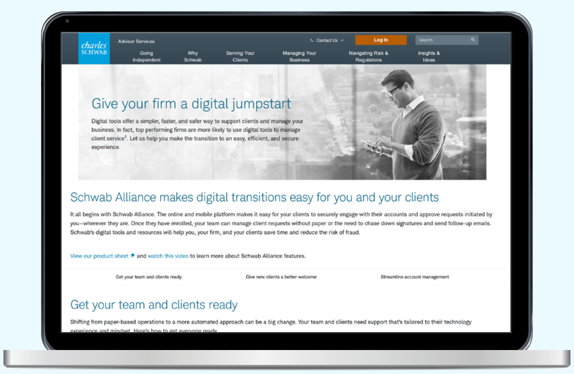


Find the right strategy that fits your firm and clients

Transitioning from paper to digital can seem daunting, especially for clients who don't use technology regularly. We have resources and insights to make the transition smoother. Sometimes, the best approach is to focus on your new clients first. By making enrollment in Schwab Alliance part of your onboarding process, clients will be ready when it comes time to approve account open and money movement requests. After that, you can lay out a plan to help current clients adopt digital tools over time. To view your client's enrollment status, go to the Profile section of Schwab Advisor Center. From there, you can determine which clients you want to reach out to first.

No single strategy works for everyone—and you know your firm best. Whatever approach you take, we're here to give you support.

Learn more about streamlining client enrollment.



Jumpstart your efforts today

Wherever you are on your digital journey, we can help you think through your strategy and build a plan that's just right for your business. Explore our educational resources to learn more about Schwab Alliance, to access tools that help you identify and support clients who haven't enrolled, and to explore best practices for streamlining the process for your team and clients.

Visit: advisorservices.schwab.com/jumpstart-firm-digital-experience.

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charles SCHWAB

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