Schwab Advisor Center® is the fastest, most secure way to complete critical tasks like opening accounts, moving money, and submitting other requests to Schwab. By using these tools instead of traditional options like faxing, your and your clients’ experience can be much improved.

- **Faster.** Digital tools mean your submissions to Schwab and your clients’ approvals can often be completed in seconds—and smart technology helps prevent errors, missing information, and wet signatures that can slow completion of paper-based transactions.

- **More secure.** Schwab’s strong encryption protocols keep your firm’s and clients’ information safe during transactions, and online and mobile security features, including two-factor authentication and eAuthorization, help fight fraud.

- **More convenient.** Online submissions mean less paper, faxing, and signing time for your clients and easy updates to existing submissions through the enhanced Status page on Schwab Advisor Center.

Here’s an at-a-glance view of how you can use the tools available on Schwab Advisor Center to replace traditional paper- and fax-based workflows.

<table>
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<th>Digital tool</th>
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| Move money            | Submit wire, check, and journal requests for your clients’ approval        | • Tools prefill client and account information  
                        |                                                                      | • Helps prevent errors and processing delays  
                        |                                                                      | • Gives you the option of using fast, secure eAuthorization tools for approval, which can have a much faster turnaround time | • Guides, webcasts, and other resources  
                        |                                                                      | For your clients:  
                        |                                                                      | • Look for the “Guide me...” note at the top of the page for a contextual walkthrough of the process  
                        |                                                                      | For your clients:  
                        |                                                                      | • Move Money on the Client Learning Center |
| Account open          | Complete account paperwork and send it to clients for eAuthorization       | • Suite of tools ensures that you can open any major account type electronically  
                        |                                                                      | • Smart field technology* helps prevent errors and delays  
                        |                                                                      | • Fields are prefilled for existing clients  
                        |                                                                      | • Clients can approve account paperwork online | • Guides, webcasts, and other resources  
                        |                                                                      | For your clients:  
                        |                                                                      | • Open an Account on the Client Learning Center |
| Address change        | Initiate an address change for one or more accounts and send it to the client for eAuthorization | • Smart field technology* helps prevent errors  
                        |                                                                      | • Clients can approve changes online | • Guides, webcasts, and other resources  
                        |                                                                      | For your clients:  
                        |                                                                      | • Client Learning Center module |
| Service Requests and Status | Use Service Requests to submit documents electronically to Schwab  
                        | Use Status to update or check requests in process | • Requests are immediately entered into Schwab’s systems with higher image quality, reducing errors and the need for call-backs  
                        |                                                                      | • Status page provides at-a-glance information about any issues with a submission  
                        |                                                                      | • Submit both text comments and documents for in-process requests | • More information about the Status page  
                        |                                                                      | • More information about Service Requests |

*For more information about the latest Schwab technology, be sure to visit the **What’s New** page, which is updated regularly. For in-depth training to help your firm learn about these new processes, visit **Schwab Advisor University**.*

For any other questions, contact your service team or consult the Service Guide.