

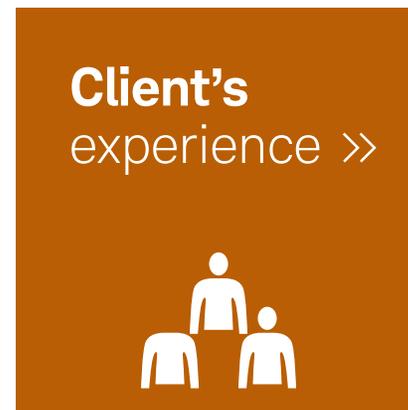


# Guide to digital address change tools

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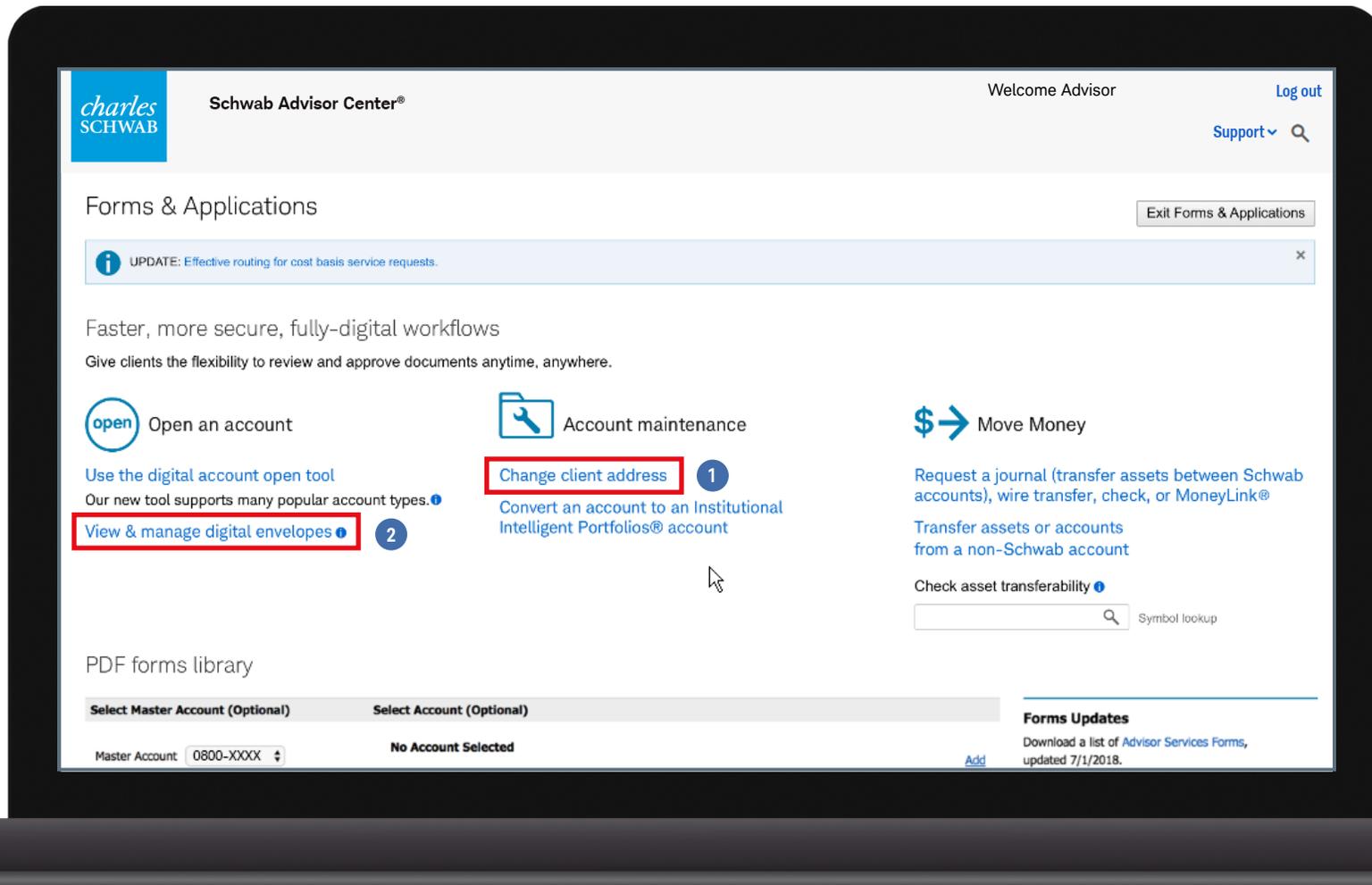
You can now use Schwab's newest, most efficient, and most secure digital tools to initiate address changes for your clients' accounts, with no paper required. The system then sends the request to your client to approve online or with a few taps on their mobile device—similar to the electronic approvals for move money transactions.

This guide is a step-by-step walk-through of the experience for you and your clients. For additional information and answers, please consult our [FAQ](#).



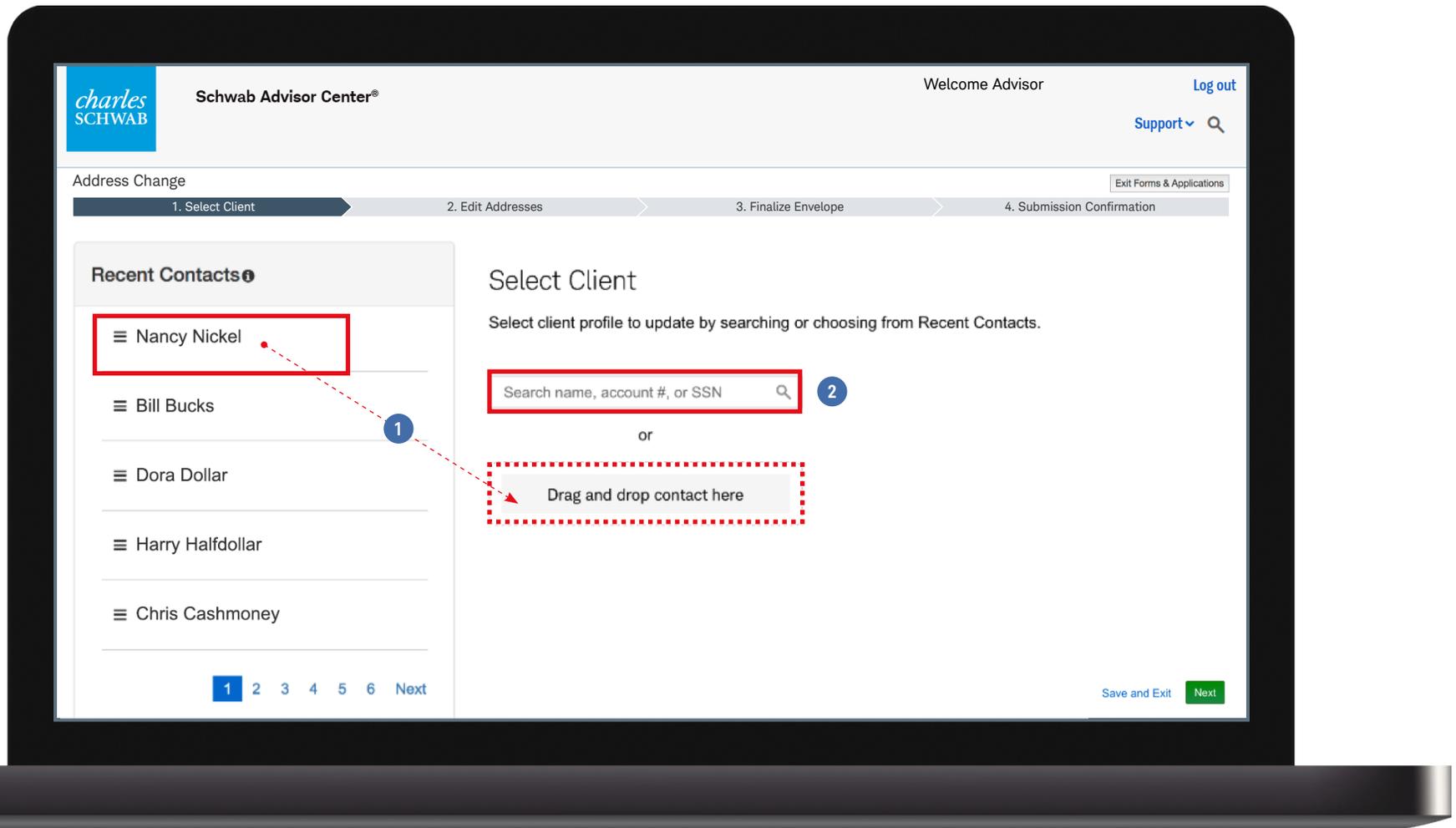


To access the tool, use the two new links on the **Forms & Applications** page. ① The **Change client address** link initiates a new process. ② Use the **View & manage digital envelopes** link to continue working on a previously saved envelope or to check on the status of an existing request.



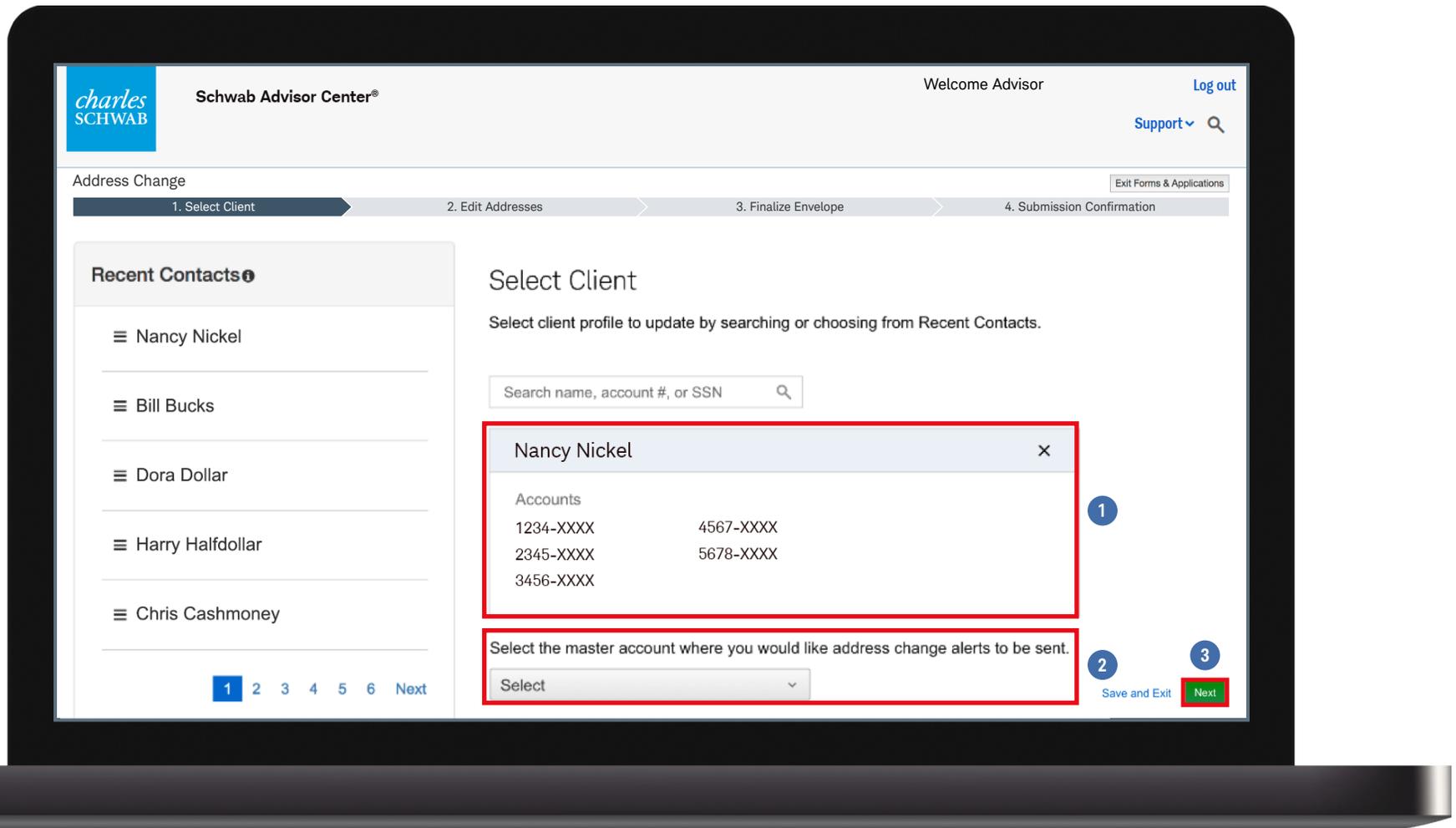


- 1 You can choose the client's name from the **Recent Contacts** list and drag-and-drop it into the space indicated.
- 2 Or you can **search** for a client based on name or on Social Security or account number.





- 1 Once you've selected a client, you'll see all accounts for which that client has authority to approve an address change.
- 2 Next, **choose the master account** to which you would like to send alerts and status updates.
- 3 Then click **Next** to begin updating addresses.





On the **Edit Addresses** page, you will see all the addresses currently associated with the client you've selected.

- 1 Click the **Edit** link to update an existing address, 2 or you can use the **Add Alternate Address** link to add a new address to the client's profile. 3 If this client would prefer that mail for all accounts be delivered to a single address, check that box and choose the address from the **drop-down list**. 4 If mail for different accounts should be assigned to specific addresses, use the drop-down list to choose the right address for each account.

**Charles SCHWAB** Schwab Advisor Center® Welcome Advisor Log out Support

### Address Change

1. Select Client 2. Edit Addresses 3. Finalize Envelope 4. Submission Confirmation

#### Edit Addresses

Change client addresses and account preferences. See the [Service Guide](#) for more information about the different types of profile addresses.

**Nancy Nickel**

**Client Profile Addresses**  
Edit or add addresses associated with this client.

- Home **Edit** 1  
211 Main Street  
San Francisco, CA 94105
- Mailing **Edit**  
2423 E Lincoln Dr  
Phoenix, AZ 85016
- Business **Edit**  
1958 Summit Park Dr  
Orlando, FL 32810
- Alternate **Edit**  
**Add Alternate Address** 2

Address confirmed.

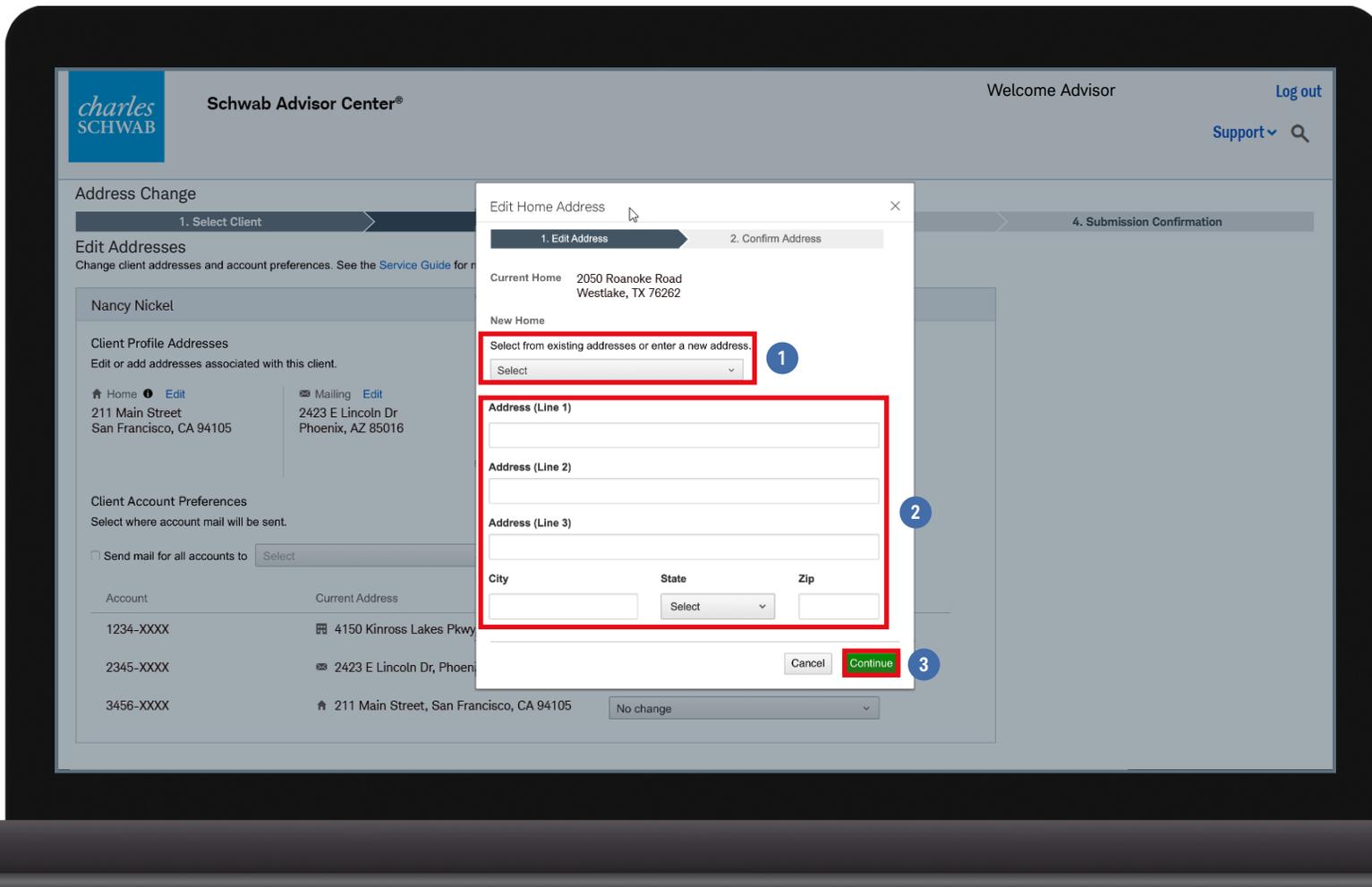
**Client Account Preferences**  
Select where account mail will be sent.

Send mail for all accounts to **Select** 3

Account	Current Address	New Address
1234-XXXX	4150 Kinross Lakes Pkwy, Richfield, OH 44286	1958 Summit Park Dr, Orlando, FL 32810
2345-XXXX	2423 E Lincoln Dr, Phoenix, AZ 85016	No change
3456-XXXX	211 Main Street, San Francisco, CA 94105	<b>No change</b> 4 211 Main Street San Francisco, CA 94105 2423 E Lincoln Dr, Phoenix, AZ 85016 1958 Summit Park Dr, Orlando, FL 32810

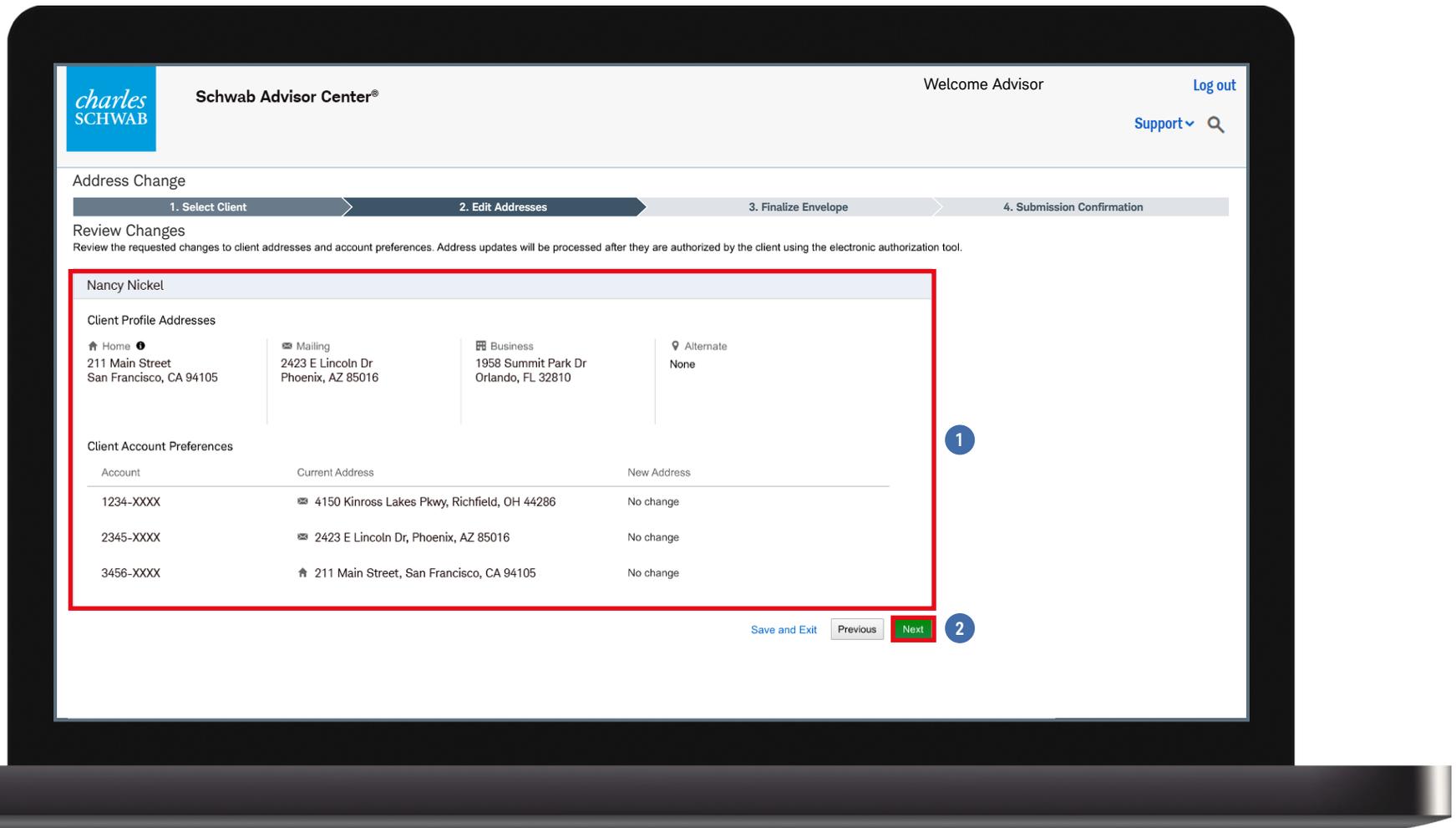


When you click the **Edit** link for an address, you have the option of **1** using the **drop-down list** to assign an existing address from the account or **2** entering a new address; for example, you can designate an existing Alternate address as a New Home address. Once you've finished, **3** click **Continue**. Please note that each address entered will be validated to ensure timely mail delivery.





- 1 Review all changes before submitting them to your client for approval, then
- 2 click **Next**.





- 1 Confirm the email address and phone number for the approving client before you send the digital envelope for authorization. If the information is correct, 2 click **Send envelope to client**.

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Digital Envelopes

1. Select Client 2. Edit Addresses 3. Finalize Envelope 4. Envelope Sent

Finalize Digital Envelope Save and Exit

Digital Envelope Name Envelope ID  
AddressChange: Nancy Nickel Edit COA102181517314

Schwab Documents and Signers

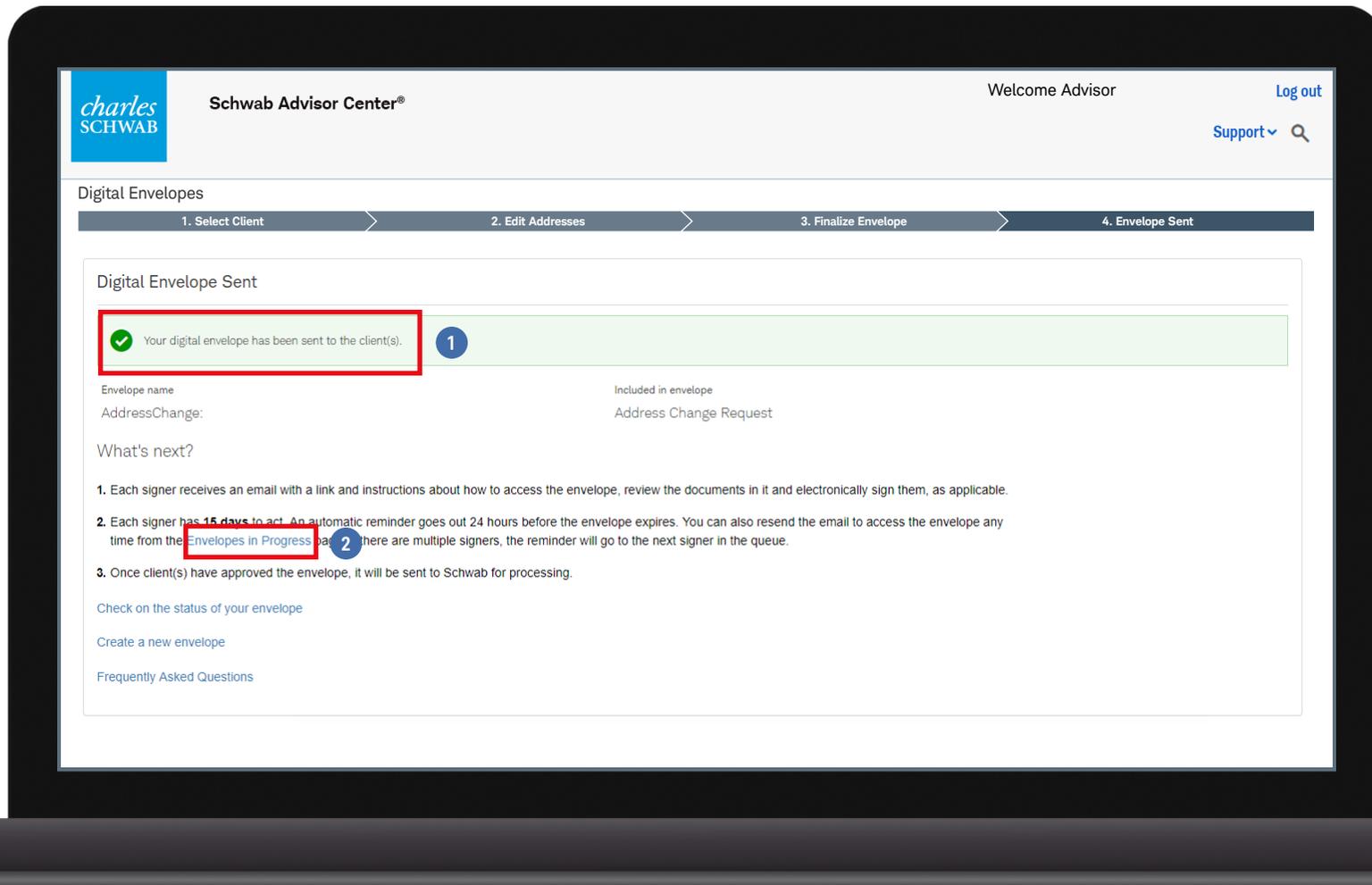
Please complete and review the information below. The account updates included in this digital envelope will be made after the client(s) provide their digital approval.

Type	Signers: Name	Email	Phone Number	Web Access	Recent Mobile Access	Portfolio Selection	Actions
AddressChange	Nancy Nickel	nancy.nickel@email.com	123-456-7890	Yes	No		Edit 1

Back Send envelope to client 2



1 You'll see a confirmation that the digital envelope has been sent to the client. 2 Click the **Envelopes in Progress** link to review the envelope's status. You will also find a link to this status page on the **Forms and Applications** page.





## Your client's approval experience

Once you've submitted the digital envelope, your client can approve the changes, using either a desktop computer or a mobile device. Choose from the two samples below to review what your client sees during each process.

Please note: The desktop experience reflects what a client who has existing Schwab accounts and Schwab Alliance login credentials will see during the approval process, while the mobile experience reflects what a Schwab client without Schwab Alliance login credentials will see. The additional steps reflected in the mobile experience are very similar to those that a client without Schwab Alliance credentials would experience when approving via desktop computer, as well.

Approving  
via web

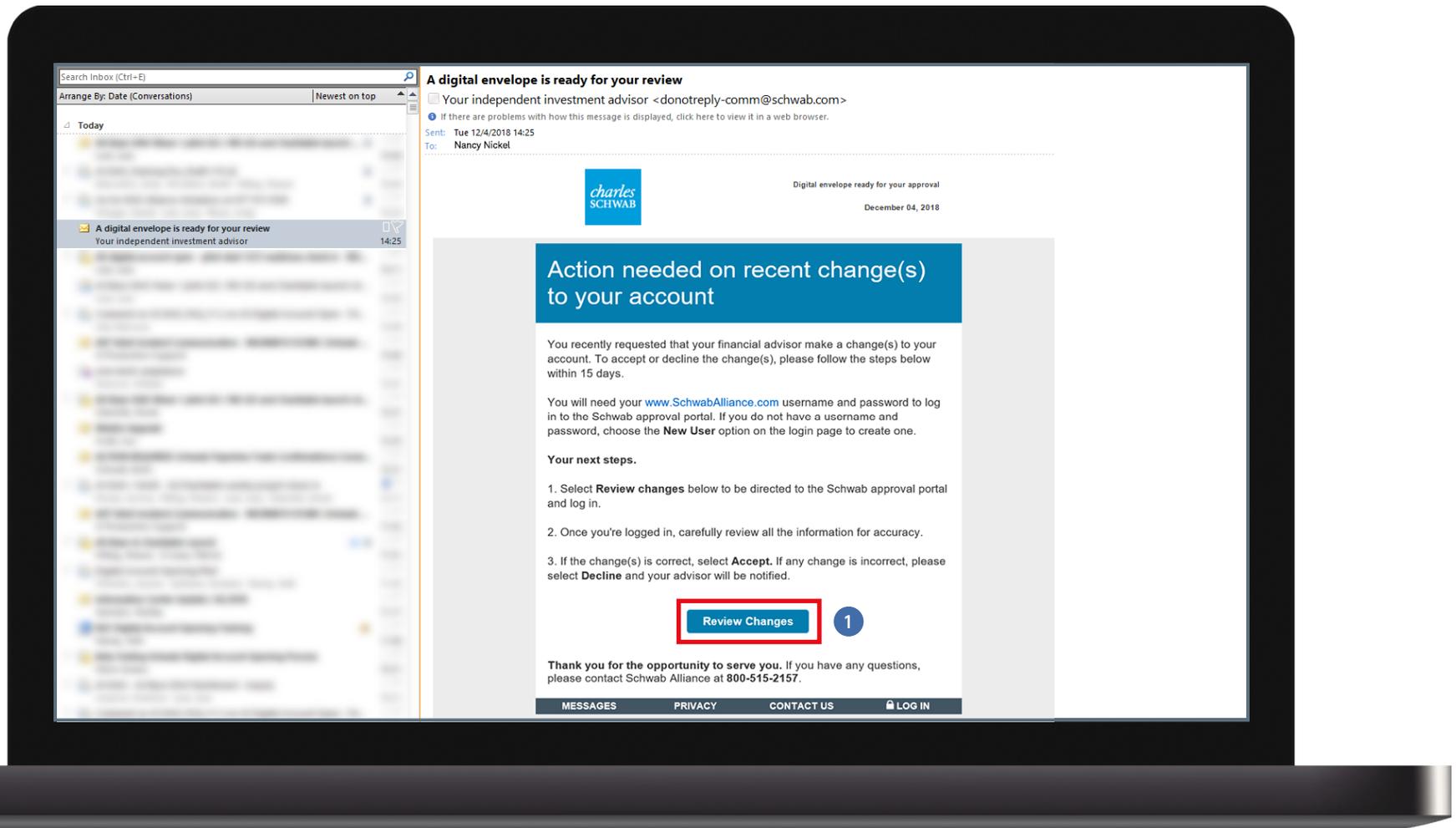


Approving  
via mobile





Once the envelope has been submitted, your client will **receive an email from Schwab**, indicating that you've initiated a change to their account that requires their approval. ① Your client will click the **Review Changes** button to begin the process.





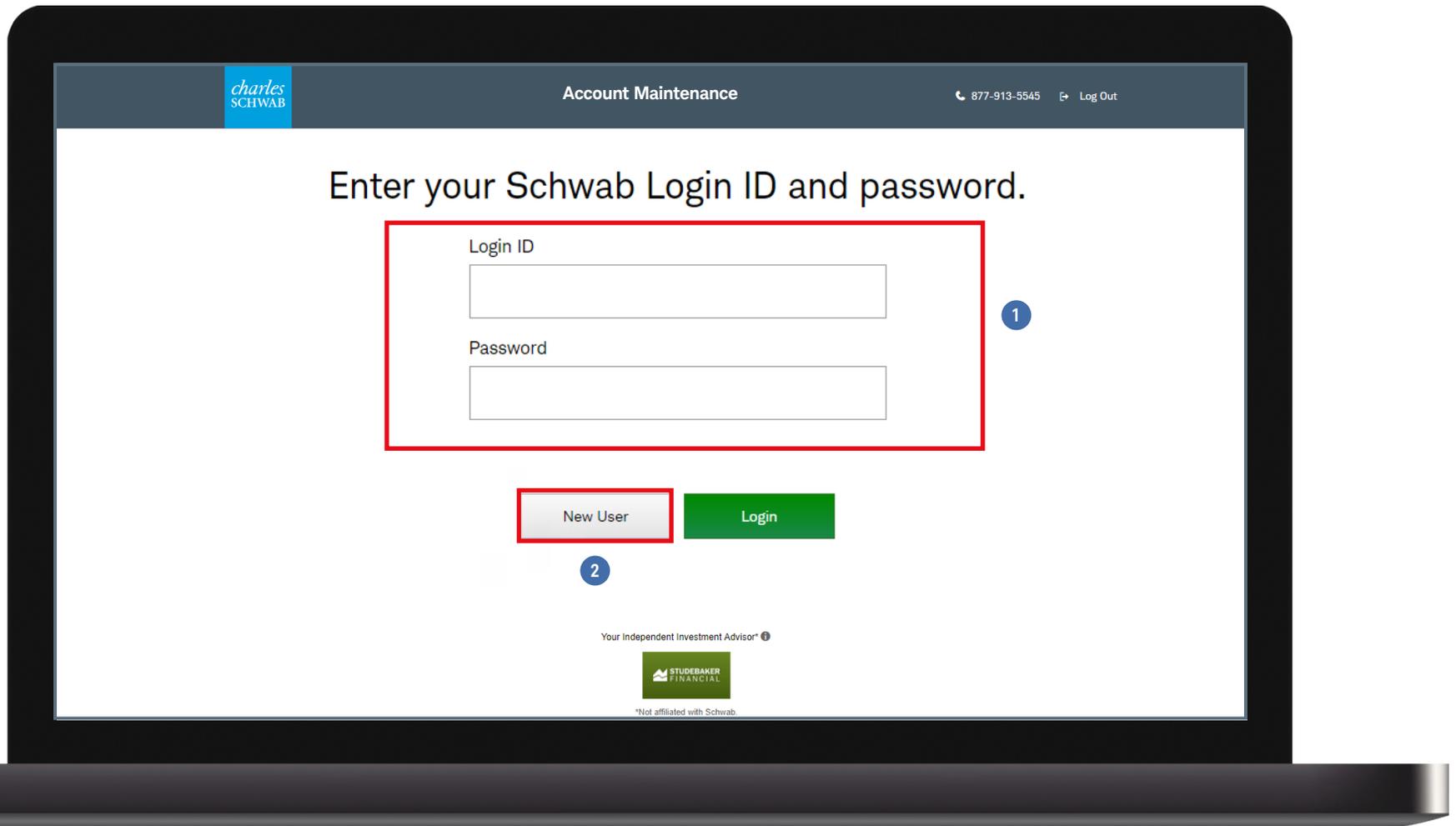
Client's  
experience >>



Approving  
via web



- 1 Your client will enter their Schwab Alliance credentials and click **Login**.
- 2 If they don't have login credentials, the client will click **New User** and follow the guided process for creating a login ID and password.





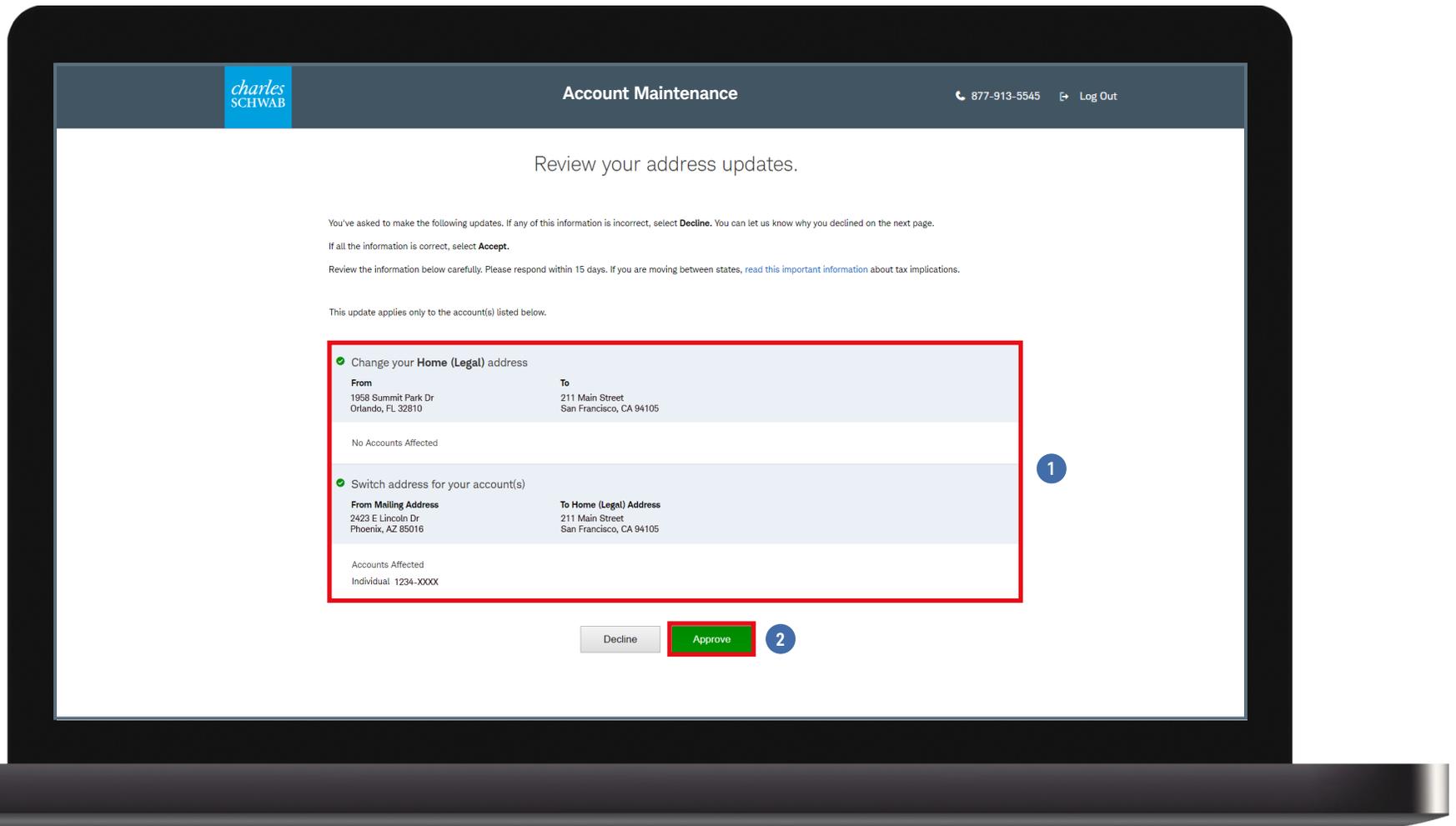
Client's  
experience >>



Approving  
via web



1 Once logged in, your client will review the changes you've initiated and 2 click **Approve** to implement them. If your client chooses to decline, no changes will be made to the addresses on the account.





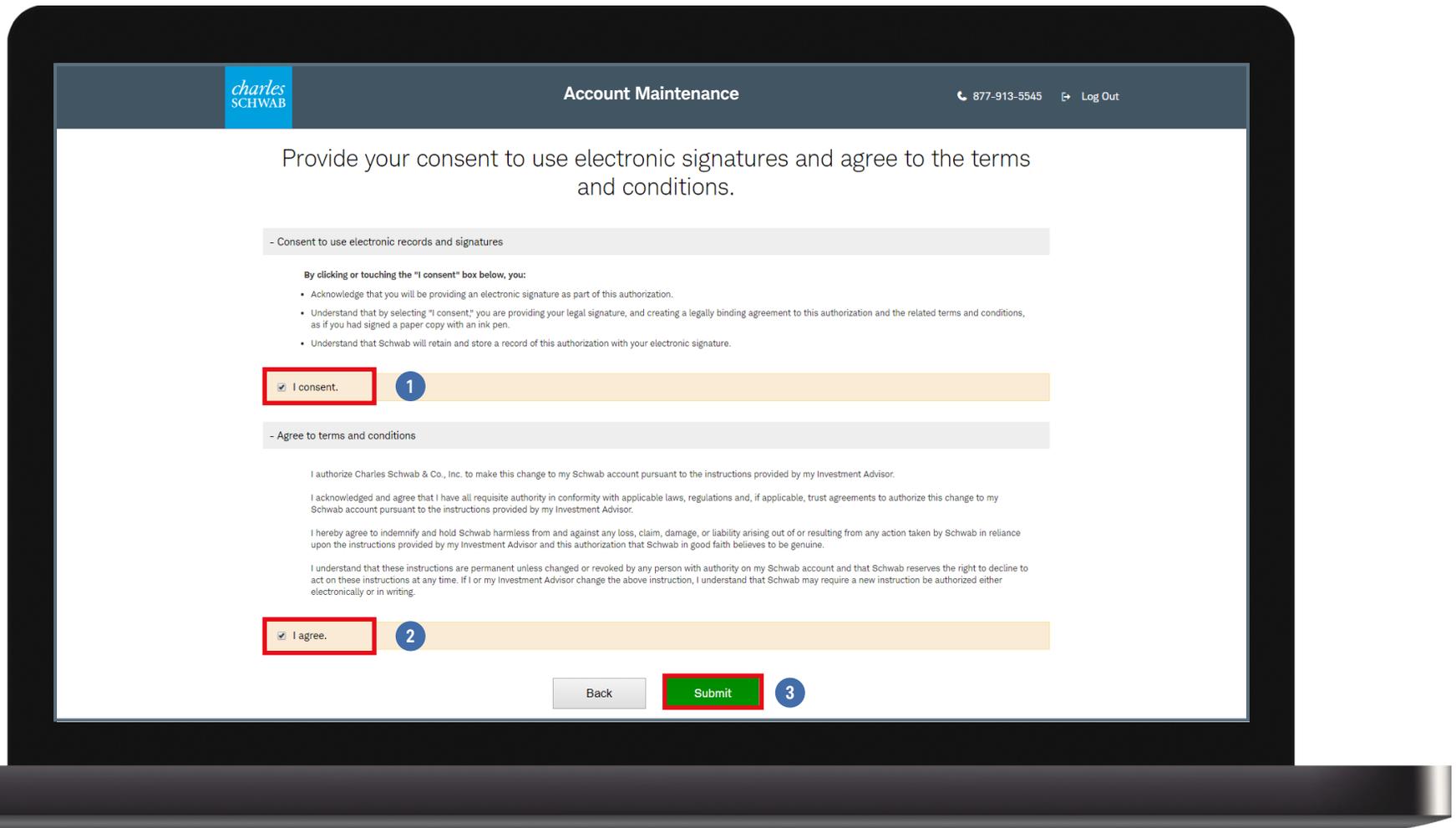
Client's  
experience >>



Approving  
via web



Your client then reviews and consents to using electronic records and signatures by **1** clicking the **I consent** checkbox. **2** The client then clicks **I agree** to the terms and conditions before **3** clicking **Submit** to complete the address change.





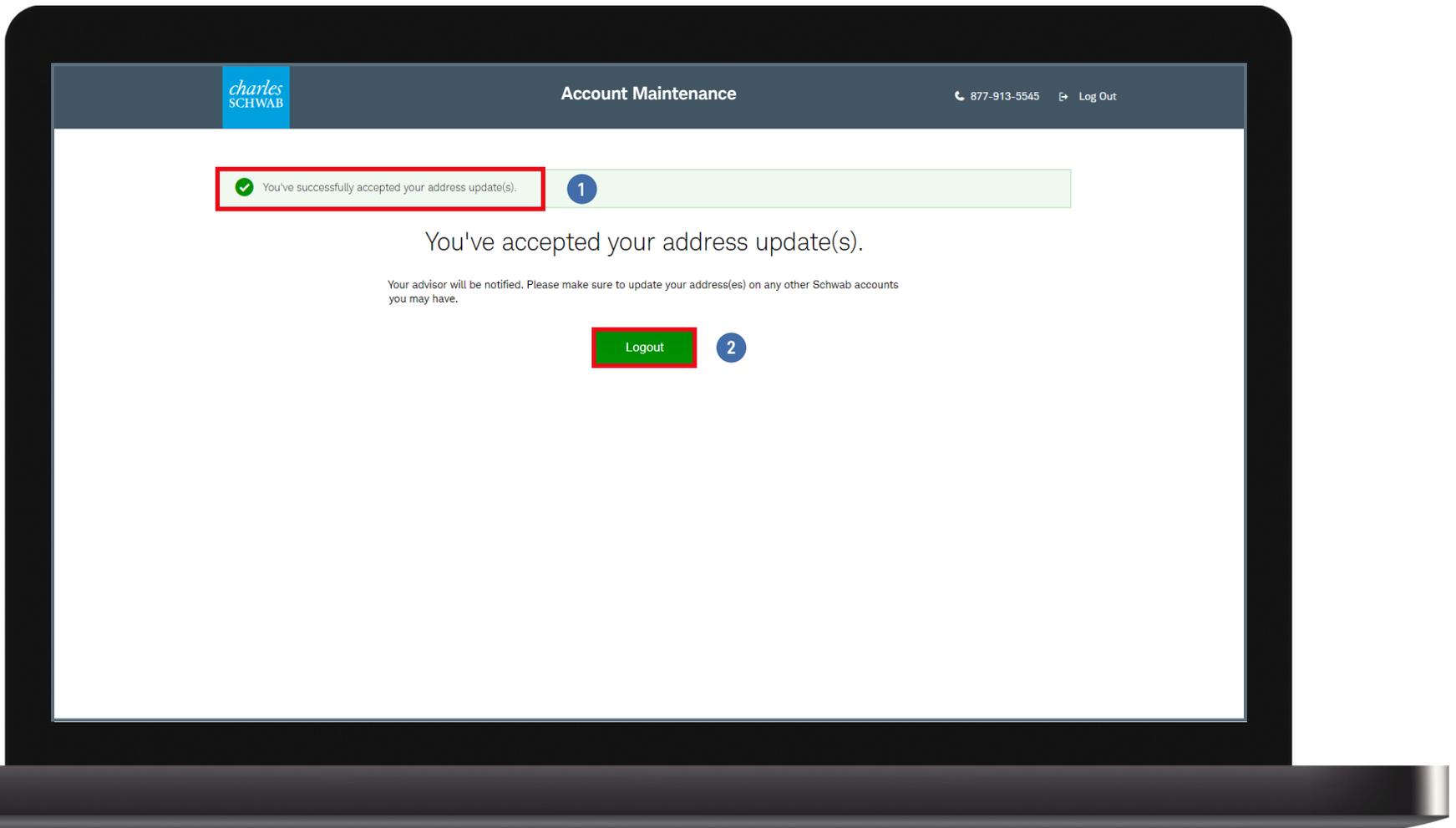
Client's  
experience >>



Approving  
via web



- 1 The next screen confirms that the process has been completed successfully.
- 2 Your client then clicks the **Logout** button to exit.





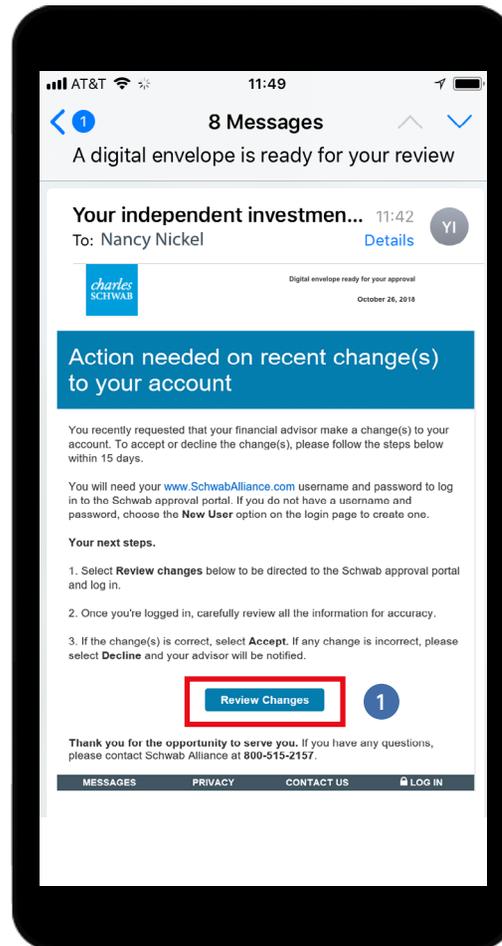
Client's  
experience >>



Approving  
via mobile



Once the envelope has been submitted, your client will **receive an email from Schwab**, indicating that you've initiated a change to their account that requires their approval. ① From a mobile device, your client will click the **Review Changes** button to begin the process.





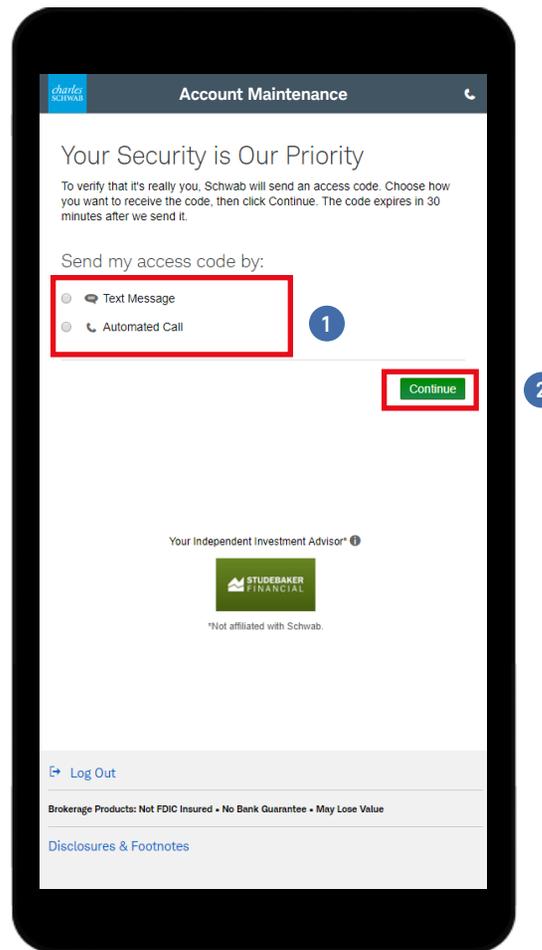
Client's  
experience >>



Approving  
via mobile



If your client does not have a Schwab Alliance login, the system will authenticate their identity by providing an **access code**. ① The client indicates their preference for receiving the code either by text message or automated call. ② The client then clicks **Continue**.





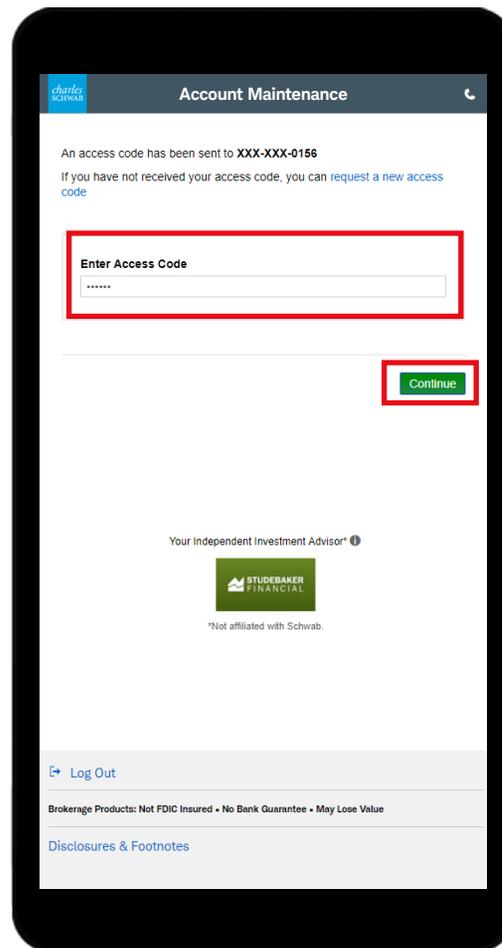
Client's  
experience >>



Approving  
via mobile



- 1 Your client enters the **access code** on the next screen, then
- 2 clicks **Continue** to complete the authentication process and proceed to approve the digital envelope.



1

2



Because this client does not have Schwab Alliance credentials, the system will prompt him or her to **1 create a login ID and password** and select a security question. The client then clicks **2 Next**. Clients with existing Schwab Alliance credentials will skip this step. Next, your client will be prompted to **3 login** with these new credentials.

Create a login ID and password for your Schwab account.

Once entered here, your login ID and password can only be changed after your account is open.

Login ID At least 6 characters

Password Passwords are case-sensitive

At least 8 characters  
At least 1 number  
At least 1 letter

Confirm Password

Security Question

Select

Answer

Back Next Cancel Account

client.schwab.com

Log in to Schwab Alliance

Login ID

Password

Start Page

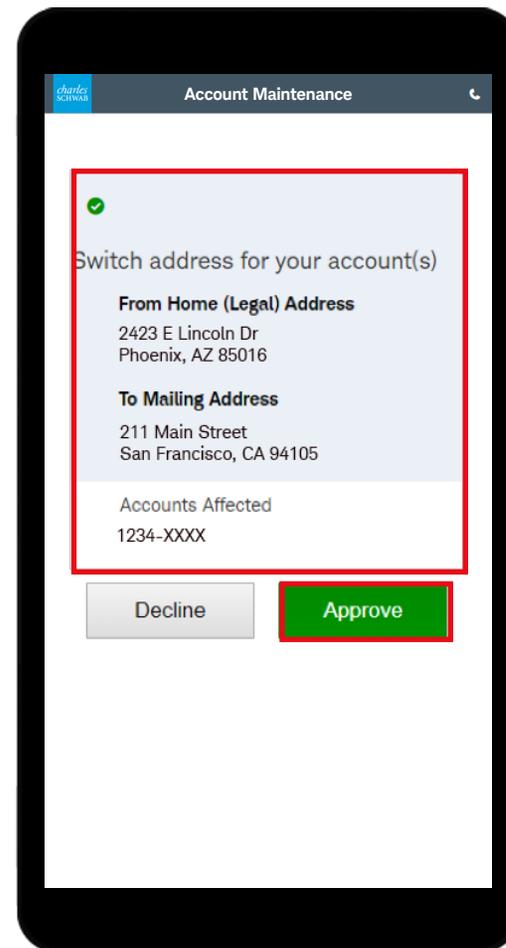
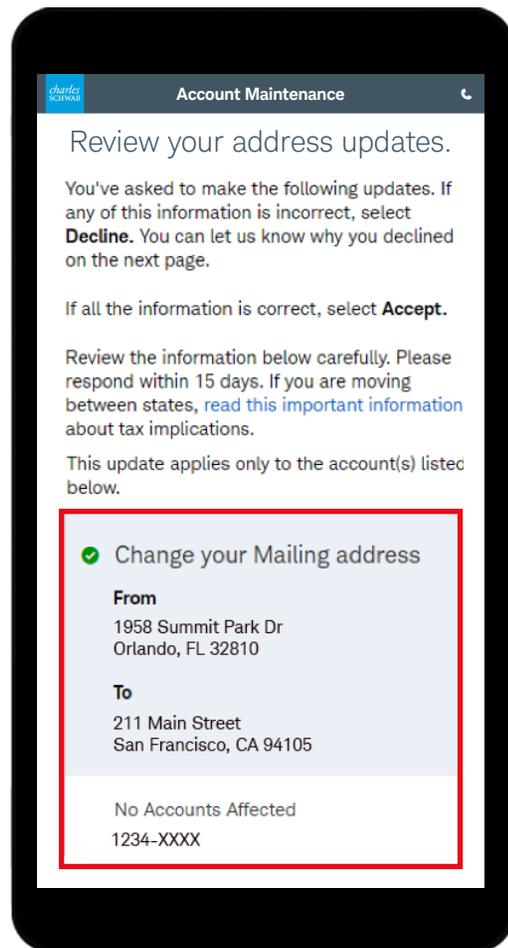
Accounts Summary

Log In

Forgot your password? New user? Log in to mobile

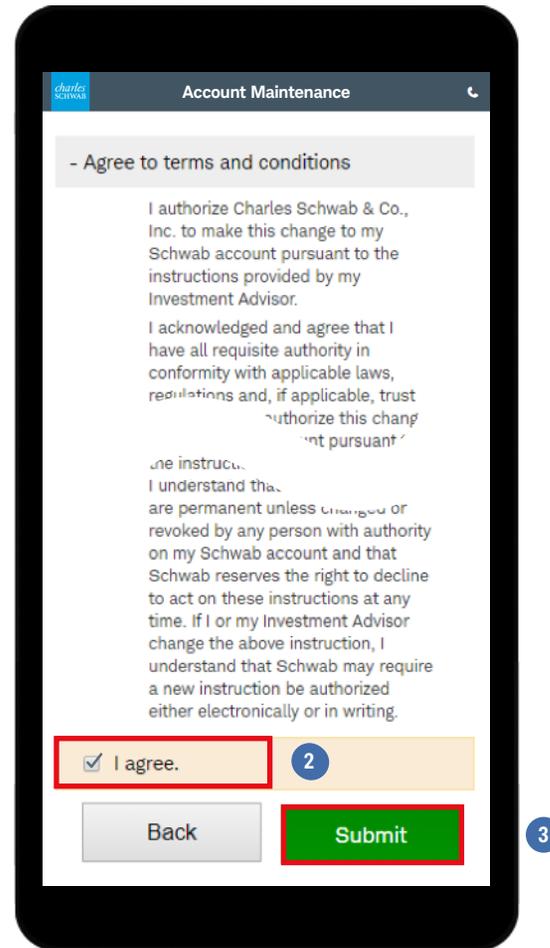
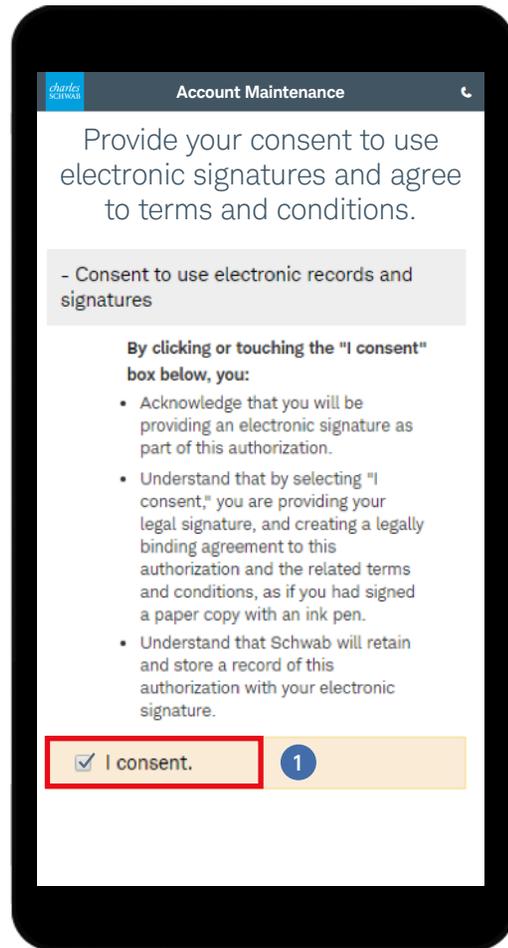


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