

# Simplify your work with the new Service Guide for Schwab Advisor Center<sup>®</sup>

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SCHWAB

The new, searchable Service Guide makes it fast and easy to find all the help and support you need. Simplified navigation takes you directly to key topics, and updated content provides clear, concise information to help you serve your clients. It's just one part of a new online service experience that extends the support you already get from your service team at Schwab.

You'll find all the topics you rely on today under new navigation, including two new areas:

### Old Service Guide

**Service Guide**

Go to the [NEW SERVICE GUIDE](#) to find updated content throughout the rest of the year.

• See our [Managed Account Platform](#) section of the managed accounts.

Show All Hide All

**Opening Accounts**  
Procedures and required documentation for opening accounts for your clients.

**Transferring Accounts**  
Required documentation for transferring accounts to and from Schwab.

**Maintaining Accounts**  
Guidelines for adding features or making changes to existing accounts.

**Deposits**  
Rules and guidelines for depositing assets into your clients' accounts.

**Withdrawals**  
Rules and guidelines for withdrawing assets from your clients' accounts.

**Trades**  
Procedures for trading assets on behalf of your clients.

### New Service Guide

Service Guide Welcome Project team Bookmarks What's New Feedback Support

SERVICING ACCOUNTS FUNDING & DISBURSEMENTS INVESTMENT PRODUCTS REPORTING & DOCUMENTATION TOOLS & ADMINISTRATION

Service Guide

Take a video tour >  
See the features and functionality of the new Service Guide

View the comparison chart >  
A resource to help you navigate the new Service Guide

Help when and where you need it  
The all new Service Guide provides better content for servicing accounts and new functionality that makes it easier to answer the question, "How do I..." in Schwab Advisor Center

Schwab Advisor University >  
Learn how to get the most from Schwab Advisor Center tools and enhance your productivity.

Electronic approvals >  
Help clients sign forms or authorize wires in minutes — online or on the go.

*Own your tomorrow.*

**Two new areas:**

**Tools & Administration**

**Reporting & Documentation**

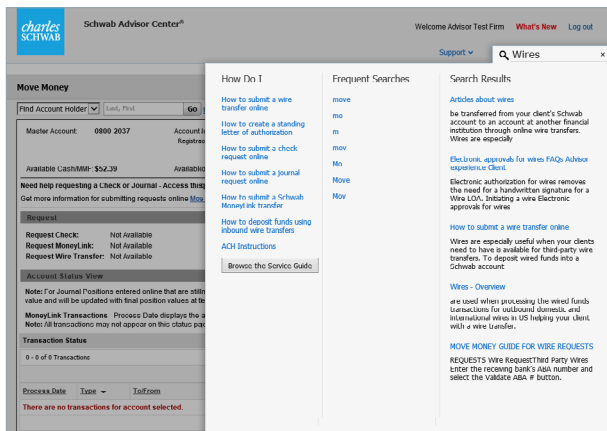
All the information you need is now organized into the following categories:

Service Guide				
SERVICING ACCOUNTS	FUNDING & DISBURSEMENTS	INVESTMENT PRODUCTS	REPORTING & DOCUMENTATION	TOOLS & ADMINISTRATION
<ul style="list-style-type: none"> <li>Opening accounts</li> <li>Maintaining accounts</li> <li>eSignature</li> <li>Account authorization</li> <li>Features &amp; services</li> <li>Schwab Bank</li> <li>Schwab Charitable</li> </ul>	<ul style="list-style-type: none"> <li>Move Money</li> <li>eAuthorization</li> <li>Deposits</li> <li>Management fees</li> <li>Transferring accounts</li> </ul>	<ul style="list-style-type: none"> <li>Trading overview</li> <li>Equities, mutual funds &amp; options*</li> <li>Alternative investments</li> <li>Cash &amp; fixed income</li> <li>Managed accounts</li> <li>Annuities &amp; insurance</li> <li>Portfolio Rebalancer</li> </ul>	<ul style="list-style-type: none"> <li>Reporting</li> <li>Account documentation</li> <li>Pricing</li> <li>Third-party services</li> </ul>	<ul style="list-style-type: none"> <li>Security Administration</li> <li>Schwab data delivery</li> <li>Schwab Mobile</li> <li>Schwab Advisor Center tools</li> <li>Service &amp; support</li> <li>Find your team</li> </ul>

# Streamline your workflow with the Service Guide's enhanced features

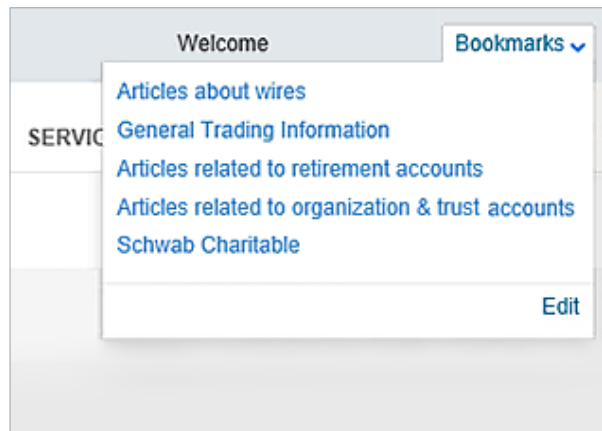
The new Service Guide provides improved navigation and search functionality that lets you find answers quickly. Plus, all the how-to articles have been refreshed and updated giving you easy access to all the information you need.

Got a question?  
Click on “Search” for quick answers



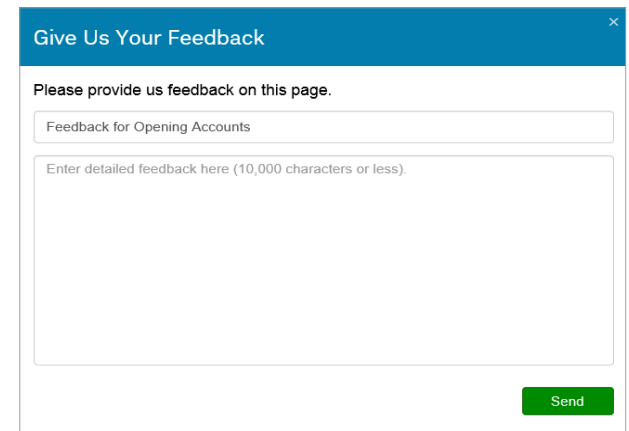
Start typing any word into the search box and the enhanced search feature will display the most relevant results, as well as what's currently trending on the site.

Want quick access to a useful article?  
Bookmark it for future reference



Manage your bookmarks and even share them with colleagues from within the site. The new Service Guide lets you bookmark any article without interrupting your workflow.

Have a comment or suggestion?  
Let us know!



Now you can share suggestions with us instantly. Use the new Feedback function to tell us what you think about the content of any page you are on.

\* Options carry a high level of risk and are not suitable for all investors. Certain requirements must be met to trade options through Schwab. Please read the options disclosure document titled "[Characteristics and Risks of Standardized Options](#)." Supporting documentation for any claims or statistical information is available upon request.

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