

What's New in Schwab Tech

Q1 2023

Technology that helps you put clients first

At Schwab, we're focused on investing in both our proprietary platform and third-party integration to help you eliminate paper, increase efficiencies, and streamline your workflows.

Below is a summary of new features and capabilities in key areas of our technology offering.



**Account
Management**



**Trading &
Investment
Management**



**Client
Access**



**Third-Party
Integration**



**Safety &
Security**



Account Management

[\\$0 fee now applies to all wires submitted through the move money tool](#)

As part of our ongoing effort to provide you and your clients with the best, fastest, and safest possible experience, we are now waiving all fees for wires submitted via the move money tool on Schwab Advisor Center.

[Learn more >](#)

[New dashboard view puts Schwab Advisor Center data at your fingertips](#)

We are in the process of adding a new dashboard feature to serve as your “front page” for Schwab Advisor Center. Just like the front page of a newspaper, the new dashboard gives you an at-a-glance view of the most important information you need to start your day.

[Learn more >](#)



Account Management (continued)

[The Service Guide—same information, new modern look and feel](#)

We know that you rely on the Service Guide for in-depth information about the Schwab policies and functionality you interact with every day. We have refreshed this tool to look and work more like our other digital experiences—yet all the same resources are still available. We hope this enhancement makes it even easier for you to find the information you need.

[Learn more >](#)



Trading & Investment Management

[Orders stay active longer after an increase to GTC expiration time limit](#)

We are pleased to announce that the good-till-canceled (GTC) expiration time limit for all new stock orders has increased from 60 days to 180 days, allowing orders to stay active longer and reducing the need to reenter them after expiration.

[Learn more >](#)



Client Access

[Schwab Alliance—new navigation, better results](#)

We have made key changes to the Schwab Alliance navigation to give your clients easier access to popular topics and the key resources they use most. We hope that Schwab Alliance continues to complement the working partnerships you have with your clients and that these changes make it even easier for them to find the information they need.

[Learn more >](#)



Third-Party Integration

[New Schwab Advisor Center integration with Salesforce Financial Services Cloud](#)

The new Schwab Advisor Center Integration for Salesforce app delivers a daily download of key account details and important alerts to help you streamline workflows and manage client accounts. The app provides not only expanded functionality but also expanded access, allowing advisors who use Salesforce Financial Services Cloud to benefit from Schwab Advisor Center integration, while Salesforce Sales Cloud users can continue using the features they've enjoyed for years.

[Learn more >](#)



Safety & Security

Register now for quarterly fraud webcasts

We work every day with advisors like you who are on the front lines in the battle against cybercriminals. To help you stay up to date with the latest fraud trends, we invite you to register for three webcasts we're hosting in 2023. Each of these sessions tackles a different aspect of the evolving fraud landscape—from best practices when handling a data incident, to protecting senior and vulnerable clients, to the growing problem of business email compromise.

[Learn more >](#)

Don't miss these key resources

Register for an upcoming Tech Talk webcast

Our webcasts hosted by Schwab's technology leadership team give you a closer look at recent and upcoming enhancements and the opportunity to ask questions.

[Register now >](#)

Stay updated on our tech investments

The What's New page on Schwab Advisor Center highlights the latest enhancements across the platform.

[See what's new >](#)

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JUT(0423-3VW3) (3/23)



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