

# Digital account open feature roadmap

The digital account open tool on Schwab Advisor Center® is the fastest, easiest, and most secure method for opening client accounts. Over the coming months, the tool will evolve in a variety of ways.

Use this at-a-glance guide before using the tool to ensure the account types and features you need are currently available. This document will be updated as development progresses.

<p><b>ACCOUNT TYPES</b></p>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Schwab One® (brokerage)</li> <li><input checked="" type="checkbox"/> Institutional Intelligent Portfolios®</li> <li><input checked="" type="checkbox"/> Schwab Charitable</li> <li><input checked="" type="checkbox"/> Trust (total identity)</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> IRAs (Rollover or Roth)             <ul style="list-style-type: none"> <li><input type="checkbox"/> SEP IRA</li> <li><input type="checkbox"/> Simple IRA</li> <li><input type="checkbox"/> Inherited IRA</li> <li><input type="checkbox"/> Custodial</li> </ul> </li> <li><input type="checkbox"/> Trust (irrevocable)</li> <li><input type="checkbox"/> Designated beneficiary</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Corporate/organization</li> <li><input type="checkbox"/> Managed accounts</li> <li><input type="checkbox"/> Estate</li> <li><input type="checkbox"/> Bank</li> </ul>	
<p><b>TIME-SAVING FEATURES</b></p>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Smart fields limiting errors</li> <li><input checked="" type="checkbox"/> Drag-and-drop data imports</li> <li><input checked="" type="checkbox"/> Digital envelope status</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Multiple account open within one envelope</li> <li><input type="checkbox"/> Status of the envelope components</li> <li><input type="checkbox"/> Clients can edit data</li> <li><input type="checkbox"/> SL/BT master account linking</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Account cloning</li> <li><input type="checkbox"/> Co-browsing with clients</li> <li><input type="checkbox"/> Bulk download of executed agreements</li> <li><input type="checkbox"/> User efficiency reporting</li> <li><input type="checkbox"/> Account open preferences</li> </ul>	
<p><b>ADDITIONAL FORMS</b></p>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Advisor forms (up to four) – ADV, privacy policy, investment policy, advisory agreement</li> <li><input checked="" type="checkbox"/> Options</li> <li><input checked="" type="checkbox"/> Margins</li> <li><input checked="" type="checkbox"/> IRA beneficiary</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> TOA</li> <li><input type="checkbox"/> IRA Distribution</li> <li><input type="checkbox"/> MoneyLink® profile set up</li> <li><input type="checkbox"/> Prime broker</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Standing letter of authorization</li> <li><input type="checkbox"/> Power of attorney (limited, full, durable)</li> </ul>	
<p><b>THIRD-PARTY INTEGRATION</b></p>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Orion – available</li> <li><input checked="" type="checkbox"/> Black Diamond – available</li> <li><input checked="" type="checkbox"/> Investnet   Tamarac – available</li> <li><input type="checkbox"/> Advyzon – in development</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> API integration support for advisor firms</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Reach out to your third-party providers if you'd like them to develop integration with Schwab's digital tools</li> </ul>	
<b>PHASE 1</b>		<b>PHASE 2</b>		<b>PHASE 3</b>

Open new accounts in less than 10 minutes.

Onboard new households using guided workflows.

Eliminate paper for every new client.

**Brokerage Products: Not FDIC-Insured. No Bank Guarantee. May Lose Value.**

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Use of certain features requires a wireless signal or mobile connection. System availability and response times are subject to market conditions and mobile connection limitations.

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