charles SCHWAB

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.

	PHASE 1	PHASE 2	PHASE 3
ACCOUNT TYPES	☑ Schwab One® (brokerage) ☑ Institutional Intelligent Portfolios® ☑ Schwab Charitable ☑ Trust (total identity)	☑ IRAs (Rollover or Roth) ☐ Trust (irrevocable) ☐ Designated beneficiary ☐ SEP IRA ☐ Simple IRA ☐ Inherited IRA ☐ Custodial	☐ Corporate/organization ☐ Managed accounts ☐ Estate ☐ Bank
TIME-SAVING FEATURES	☑ Smart fields limiting errors ☑ Drag-and-drop data imports ☑ Digital envelope status	☐ Multiple account open within one envelope ☐ Status of the envelope components ☐ Clients can edit data ☐ SL/BT master account linking	☐ Account cloning ☐ Co-browsing with clients ☐ Bulk download of executed agreements ☐ User efficiency reporting ☐ Account open preferences
ADDITIONAL FORMS	☑ Advisor forms (up to four) – ADV, privacy policy, investment policy, advisory agreement ☑ Options ☑ Margins ☑ IRA beneficiary	☐ TOA ☐ IRA Distribution ☐ MoneyLink® profile set up ☐ Prime broker	☐ Standing letter of authorization ☐ Power of attorney (limited, full, durable)
THIRD-PARTY INTEGRATION	☑ Orion – available ☑ Black Diamond – available ☑ Envestnet | Tamarac – available ☐ Advyzon – in development	☐ API integration support for advisor firms	☐ Reach out to your third-party providers if you'd like them to develop integration with Schwab's digital tools
	Open new accounts in less than 10 minutes.	Onboard new households using guided workflows.	Eliminate paper for every new client.

Roadmap subject to change.

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

charles SCHWAB

Own your tomorrow.