

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

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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