Resources for increasing digital adoption

Your technology adoption dashboard can help you identify areas of opportunity for improved operational efficiency and scalability. Listed below are tool-specific resources to help you take advantage of those opportunities for your firm.

Resource	Description
Schwab Advisor University®	Interactive and in-depth training for Schwab Advisor Center's digital tools and workflows.
Introduction to Schwab Alliance	Need an overview of the site? Use the Service Guide's Introduction to Schwab Alliance to learn more about the key features of both the website and the mobile platform and review the tools and customizations you can offer your clients.
Your clients' experience on Schwab Alliance	Improve client relationships and your firm's efficiency by better understanding how Schwab Alliance can keep your clients informed.
Supporting your clients on Schwab Alliance	Learn about the key capabilities that schwaballiance.com offers your clients and how you can support their use of the site. This resource provides detailed instructions for walking your clients through a variety of actions on Schwab Alliance.
Digital onboarding demonstration	View a demonstration of Schwab's newest, most efficient, and most secure digital tool to open client accounts securely in minutes—no paper required.
Interactive guide to digital onboarding	Use this guide for a step-by-step walk-through of the digital account open experience for you and your clients.
Introduction to the move money tool	Visit this area of the Service Guide to learn how your firm can use one simple tool to submit journal, Schwab MoneyLink®, wire, and check requests through Schwab Advisor Center. You can also access the Move Money Activity Report to view and monitor transactions submitted on a particular day.
Electing paperless documents for your clients' accounts	This overview shows how to initiate the paperless enrollment process for client approval. Registering for eDelivery of statements, trade confirmations, and other important account documents cuts down on paper mail, enhances security, and makes it easy to find up to seven years of historical information with a few clicks.

Resource	Description
Monitoring the Status of Your Submitted Requests 🔒	This video shows how to view the real-time status of your submitted requests on Schwab Advisor Center's Status page and update requests that are not in good order.
Client resources	Direct your clients to the Client Learning Center to learn how to perform such actions on their accounts as making account changes, moving money, and going paperless. We even have a Client Learning Center guide to help you navigate the site and identify how better to connect with clients.

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