New grant to charity experience - Schwab Charitable Client Center

Grant to charity – enhancements for donors
October 2020
Schwab Charitable implemented an enhanced, seven step process to simplify your granting experience

What’s new or enhanced?

- Introduction of the Step-O-Meter to help guide you through your grant recommending process
- Modern design with new user interface (UI)
- Increased visibility for scheduled grants as the most efficient way to recommend a grant
- Combined grant custom purpose and additional note to charity to create clarity. Now, you may input this information into the, “What would you like the charity to know?” field
- Donors will follow seven guided steps
Step 1: Welcome banner and charity selection

Welcome banner to announce new granting experience

You will still select your charity as usual.

Once a charity has been selected, you may modify the charity address if necessary (pop-up)
Step 2: Select grant amount

Select from five grant values or enter a custom amount.

View which investments are funding the grant; customize allocations by investment type if so desired.
Step 3: Schedule the frequency of the grant

When you schedule grants in advance, it increases efficiency – faster processing time driven by automation.

If you select later (above) or schedule a recurring grant, you can provide the timeframe for your support.

Select “other” to see additional granting frequencies.
Step 4: Dedicate the gift to someone special

Would you like to dedicate this gift to a friend or loved one?

- No
- Yes

If you wish to dedicate your grant, you may choose the language that will populate in the charity letter and enter a name of an individual.
Step 5: Grant purpose

Select from two options…

Selecting “wherever it is needed most” is the most efficient way to submit a grant.

If you wish to be more prescriptive, you may select the option, “I have a specific use for this grant.” You will receive a drop down list of options including, “my need is more specific.”
Step 5: Grant purpose

Information bubbles will appear for many of the special purpose grant options. Click them to read a description.

If you would like to create a custom purpose for the grant, you may enter the desired grant purpose in the open text field.

The previous options of “other purpose not listed” and “additional note to charity” have been combined into this one option.
Step 6: Acknowledgement and grant letter preview

Upon approval, we're going to send a grant letter to the charity.

This includes a check, and information like your name and address.

Select what you want to include in the letter:
- Name:
- Account Name: John and Mary Client Test Charitable Fund
- Include my mailing address
- I want to be anonymous (I don't want to include my name or address).

You may choose to provide the charity with your name, account name, and mailing address, or you may choose to be anonymous.

View what the grant letter to the charity will look like; you can now review accuracy of the letter and proceed to the final steps of program policies, permissible grant verification, and final submission.
Step 7: Confirm and submit

The confirmation email field will be prepopulated with the donor’s address. You may also select an alternate email address if on file.

Certify you have read and are abiding by our program policies for recommending grants.

Once you have certified, you can confirm and submit the grant for processing.
Thank you! You're all set, you can close this page now.

Your grant recommendation for $250.00 One Time to Food Bank has been submitted for processing.

<table>
<thead>
<tr>
<th>Grant details</th>
<th>What next?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food Bank</strong>&lt;br&gt;123 Main Street&lt;br&gt;City, CA 12345</td>
<td><strong>Make another grant</strong>&lt;br&gt;Want to recommend another grant?&lt;br&gt;<a href="#">Go back to the Grant to Charity page</a></td>
</tr>
<tr>
<td><strong>How much did you grant?</strong>&lt;br&gt;$250.00</td>
<td><strong>Contribute to your account</strong>&lt;br&gt;Now that you've made a grant, replenish your account.&lt;br&gt;<a href="#">Go to Contribute to My Account page</a></td>
</tr>
<tr>
<td><strong>Grant frequency?</strong>&lt;br&gt;One Time, starting today</td>
<td><strong>Go to your account overview</strong>&lt;br&gt;See your account performance, recent grants, and more.&lt;br&gt;<a href="#">Go to Account Overview page</a></td>
</tr>
<tr>
<td><strong>How do you want the charity to use this grant?</strong>&lt;br&gt;Wherever it is needed most</td>
<td></td>
</tr>
<tr>
<td><strong>What you included in the grant letter:</strong>&lt;br&gt;Account Name: John and Mary Client Test Charitable Fund</td>
<td></td>
</tr>
</tbody>
</table>
Schwab Mobile App

Manage your Schwab Charitable account on the Schwab mobile app.

www.schwabcharitable.org
Schwab Charitable donors can also manage their accounts through the Schwab Mobile app.

Download the Schwab Mobile app…... on any of these three devices:

- iPhone
- iPad
- Android

* The Schwab Mobile App requires a wireless signal or mobile connection. System availability and response times are subject to market conditions and mobile connection limitations. Trades receive outside normal market hours will be entered the next business day. Mobile Deposit is subject to limitations and other conditions.

* iPhone and iPad are trademarks of Apple Inc., registered in the U.S. and other countries.
Schwab’s Mobile app includes Schwab Charitable accounts including balances, positions, and history

Tap the Charitable Gift Account to view:
- Account Balances
- Positions
- History

Account Balances
- Easily see the Total Account Balance and the Balance Available for Granting

Positions
- View positions of the selected investment pool

Transaction History
- Filter by Grants, Contributions or all Transactions

Schwab's Mobile app includes Schwab Charitable accounts including balances, positions, and history.
Donors can recommend a grant from their mobile device

Grant Again to a favorite charity...

Schedule the grant and customize the grant acknowledgment letter

Select previously used names or enter a new name

Include an Additional Acknowledgment

Schedule the grant to be made one time in the future or on a recurring basis

One time in the future...

Recurring basis...

...or Search for a new charity

Schedule the grant:

- Select Grant Frequency
  - Select
  - Annually (1 per year)
  - Semi-Annually (2 per year)
  - Quarterly (4 per year)
  - Bi-Monthly (6 per year)

Acknowledgment in Grant Letter:

- Choose how you would like to be acknowledged in the grant letter that will be sent to the charity.
  - Name
    - Enter name(s) or select from menu
  - Include Account Name
    - Yes
  - Include John Client’s mailing address?
    - Yes
  - Include Additional Acknowledgment (optional)
    - Sally Johns and her dedication to Habitat
Thank you.

Schwab Charitable is the name used for the combined programs and services of Schwab Charitable Fund™, an independent nonprofit organization. Schwab Charitable Fund has entered into service agreements with certain affiliates of The Charles Schwab Corporation “Schwab”.

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