New grant to charity experience - Schwab Charitable Client Center

Grant to Charity – Enhancements for your clients
Schwab Charitable implemented an enhanced, seven step grant to charity process to simplify your clients’ experience

What’s new or enhanced?

- Introduction of the Step-O-Meter to help guide donors through their 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, donors 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

The donor will still select their charity as usual.

Once a charity has been selected, the donor 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

Encourage donors to schedule their grants. It increases efficiency – faster processing time driven by automation.

If a donor selects “later” or a recurring grant, they can provide the timetable for their support.

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

Determine if the recommended grant will be dedicated to someone

If the donor wishes to dedicate their “gift” they may choose the language that will populate in the charity letter and enter a name.
Step 5: Grant purpose

Select from two options...

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

If the donor wishes to be more prescriptive, they may select the option, “I have a specific use for this grant.” The donor 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 the donor wants to create a custom purpose for the grant, they 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).

View what the grant letter to the charity will look like; donors can now review accuracy of the letter and proceed to the final steps of program policies, permissible grant verification, and final submission.

The donor can still provide the charity with their name, account name, and mailing address, or they may choose to be anonymous.
Step 7: Confirm and submit

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

The donor will certify they have read and are abiding by our program policies for recommending grants.

Once the donor has certified, they can confirm and submit the grant for processing.
Step 7: Final confirmation page

✅ 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.

Grant details

- Food Bank
  123 Main Street
  City, CA 12345

- How much did you grant?
  $250.00

- Grant frequency?
  One Time, starting today

- How do you want the charity to use this grant?
  Wherever it is needed most

- What you included in the grant letter:
  Account Name: John and Mary Client Test Charitable Fund

What next?

- Make another grant
  Want to recommend another grant?
  Go back to the Grant to Charity page

- Contribute to your account
  Now that you've made a grant, replenish your account.
  Go to Contribute to My Account page

- Go to your account overview
  See your account performance, recent grants, and more.
  Go to Account Overview page
Schwab Mobile App
Schwab Charitable

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
Donors can recommend a grant from their mobile device

Grant Again to a favorite charity…

- Schedule the grant and customize the grant acknowledgement letter

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

...or Search for a new charity

- Include an Additional Acknowledgment