

Get the right person on the line—the first time

Voice Assistant Tip Sheet

With a simple phrase, Schwab's voice assistant will quickly direct your call to a service expert who can accurately answer your questions. Use this tip sheet as a guide for effectively navigating our voice assistant system.

General guidance

Focus your responses on a few specific words.

Avoid general terms such as "service" or "representative."

Keep it simple and use short, direct phrases such as "status" or "new accounts."

If you're calling about several topics, ask for help on the most complex one first so our service team can either assist you or transfer you to the specific department to answer your questions.

Useful prompts to get started



Need to move money?

- "Send a wire"
- "Moneylink"
- "Journal"
- "Check request"
- "Check deposit"
- "Estate move money"
- "Trust money movement"



Trying to set up a new account?

- "Activate account"
- "Open account"
- "New account"



Need help with account maintenance?

- "Update account"
- "Change address"
- "Alert"
- "Order checks"
- "Stop pay"
- "Change beneficiary"



Having technical issues?

- "Password reset"
- "Technical support"
- "Issues online"
- "Advisor Platform Support"



Looking for assistance on retirement accounts?

- "IRA distribution"
- "Required minimum distribution"
- "Tax withholding election"
- "Roth conversion"



Checking the status of a request?

- "Check on progress of service request"
- "Check on paperwork"
- "Check on wire status"
- "Estate status"