

# Securing client approvals with eAuthorization

**eAuthorization is a fast, safe, and convenient way for clients to approve move money requests, whether they're online or on the go.** You can use it to secure approvals for the cash journals, wires, or checks you initiate from Schwab Advisor Center®. Here's how to get started.



1

## Verify the request to prevent fraud

Before initiating the transaction, contact your client to confirm the details, including the amount, funds source, instructions, and intended recipient.



2

## Confirm your client has Schwab Alliance credentials

If needed, review the eAuthorization process with your client and confirm their credentials. Share [this video](#) with your client explaining how eAuthorization and Schwab Alliance work together. Your client must be enrolled in Schwab Alliance to approve transactions via eAuthorization.

- If your client is enrolled, make sure their **email and cell phone info** is updated so they can receive security notifications.
- If your client is *not* enrolled, send them an invitation from the **Move Money eAuthorization tab**, or you can set up a transaction and invite them to enroll when you send the transaction for approval.



3

## Enter transaction details on the Schwab Advisor Center Move Money tab

Review the [guide](#) for detailed instructions.



4

## Send transaction for eAuthorization

- On the Transaction Review page, select the client who will approve the transaction.
- If your client doesn't have Schwab Alliance credentials, you can send them an invitation to enroll at this step.
- They'll then be able to create Schwab Alliance credentials during their approval process.



5

## Receive client approval

- Your client receives an email or mobile notification that their request **needs approval**. The email prompts your client to log in to Schwab Alliance.
- Once logged in, your client clicks on the envelope icon in the upper-right corner of the screen. From there, they will be prompted to review the details and approve the transaction.



6

## Check on the transaction's status to keep your client updated

You can view the status of your clients' eAuthorization approval in the Transaction Table on the Move Money Tab.

For educational purposes only. Screenshots and graphics are for illustrative purposes only.

This material is for institutional investor use only. This material may not be forwarded or made available, in whole or in part, to any party that is not an institutional investor.

Schwab Advisor Services™ serves independent investment advisors and includes the custody, trading, and support services of Charles Schwab & Co., Inc. (“Schwab”), a registered broker-dealer and member SIPC. Independent investment advisors are not owned by, affiliated with, or supervised by Schwab.

Schwab Advisor Center® is a website of Schwab for the exclusive use of advisors who custody assets at Schwab.

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.

Schwab Alliance is a website of Schwab for the exclusive use of clients of advisors who custody assets at Schwab. Requires a wireless signal or mobile connection. System availability and response times are subject to market conditions and mobile connection limitations. Functionality may vary by operating system and/or device.

Access to electronic services may be limited or unavailable during periods of peak demand, market volatility, systems upgrade or maintenance, or for other reasons.

To learn more about the Schwab Security Guarantee, go to [schwab.com/schwabsafe/security-guarantee](https://schwab.com/schwabsafe/security-guarantee).

©2023 Charles Schwab & Co., Inc. All rights reserved. Member SIPC.

JUT (0623-37Z4) MKT118147-00 (06/23)

00275149



*Own your tomorrow.*