Schwab Managed Account Central®:
A website that fits your needs.

The Schwab Managed Account Central portal (portal) makes it easy to maintain your firm's offering details and communicate changes to Charles Schwab & Co., Inc. (Schwab) with just a few clicks. Reviewing your firm's managed account details regularly provides several benefits:

Display your strategies to the right audience

Updating your managed account details ensures advisors are sharing the most up-to-date information with prospective clients.

Receive timely communications from Schwab

From time to time, Schwab's Money Manager Relations team may need to contact your firm. By having the current contact details on file, we'll be able to quickly share valuable information with the right people at your firm

How to gain access

New Users

Contact the Money Manager Relations team to request access.
MoneyManagerRelations@schwab.com

Returning Users

Log on to the Schwab Investment Manager Gateway site and launch the Schwab Managed Account Central portal.
www.schwabimg.com

You will receive status update emails regarding your submissions. These notices will come from: ManagerDisclosureDocuments@schwab.com or MoneyManagerRelations@schwab.com.

To avoid missing these communications, please add these email addresses to your "Safe Senders" list.

Targeted experience

The portal identifies the platform that contains your active strategies and provides specific features*:

Portal capabilities for Managed Account Select® and Managed Account Access®

Upload your firm's form ADV to ensure clients receive the most current version.

Portal capabilities for Managed Account Marketplace®

Fast and easy options to add new strategies to the Managed Account Marketplace platform.

Additional tools to help manage your business with Schwab

www.schwabadvisorcenter.com is a great tool that provides you with a detailed view of your clients' account details, ranging from the strategy in which they're enrolled, to their account type.

Navigation Tabs in Schwab Managed Account Central

My Requests

My Firm Information

Firm Details

Firm Contacts

Firm Strategies

My Disclosure Documents

*The ability to request a strategy addition through the Schwab Managed Account Central portal is available for Managed Account Marketplace® strategies only. For Managed Account Access® strategy add requests, please contact the Money Manager Relations team.

The Select and Access programs are sponsored by Charles Schwab & Co., Inc. ("Schwab"). The MMs in Select are not affiliated with Schwab. The Schwab Center for Financial Research ("SCFR") is a division of Schwab. In Select, SCFR conducts an operational evaluation of MMs, monitors the MMs performance periodically, and provides research. In Access, SCFR conducts operational evaluations of unaffiliated MMs. Schwab does not provide advice or recommendations regarding managed accounts, MMs, or securities to investment advisors or their clients. Independent investment advisors are not owned by, affiliated with, or supervised by Schwab.

The Managed Account Marketplace® ("Marketplace") platform is not a program sponsored by Schwab. Marketplace is an open architecture platform that gives investment advisors and their clients' access to separate account managers and turnkey asset management providers (TAMPs). Participating money managers (MMs) and TAMPs need to establish a contract and have system compatibility with Schwab in order to be in Marketplace. The MMs, TAMPs, and their investment strategies available in Marketplace are not evaluated by Schwab.