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### Creating a Listing

[What is the process for creating a listing?](#)

Creating a listing is a 2-step process. First, you create your personal access code and complete your contact details. Next, you input information about your career listing or candidate listing. Once you've completed these two steps, you'll see a preview of your listing as it will appear to other users in their search results.

[What information is required to complete a listing?](#)

Choose one of the following for details:

[Career Opportunity Listing](#)

[Candidate Listing](#)

[What information will be visible to other users?](#)

After you complete the Career Listing Details or the Candidate Information page, you'll see a Preview page showing you what others will see on the Career Opportunity Service.

[About how long does it take to complete a listing?](#)

Creating your listing takes only about 10 minutes when you have the required information. Use one of the following worksheets to help you gather the required information in advance:

[Career Opportunity Listing](#)

[Candidate Listing](#)

[What if I can't complete my listing all at one time?](#)

No problem. As long as you have provided your access information and contact details, and completed at least some of the Career Listing or Candidate Information page, you can save a partial listing for completion later. When you return, you will enter your access code and be taken to your My Listings page, where you will see your saved listing.

[Can I have multiple active career listings at the same time?](#)

Yes. You can have as many career listings active at a time as your firm needs.

[Can I have multiple active candidate listings at the same time?](#)

No. You can only have one active candidate listing at a time.

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### [Does Schwab offer any help in submitting listings to the service?](#)

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Yes. If you are a Schwab Advisor Services™ client, your relationship manager will be happy to walk you through the necessary steps for creating a listing. In addition, our human capital team is available to help you with any questions. Please email [sashumancapitalsupport@schwab.com](mailto:sashumancapitalsupport@schwab.com) for assistance.

### **Access to Listing**

#### [I don't know or remember my access code. What do I do?](#)

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If you have previously created a password for the M&A Listing Service, this password is now your access code. If need an additional reminder, click the "Forgot Your Access Code?" link below the login box or email [sashumancapitalsupport@schwab.com](mailto:sashumancapitalsupport@schwab.com) for assistance.

#### [How do I change my access code?](#)

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You can change your access code in the My Profile tab. Once you change your access code, the previous code will become invalid.

#### [If I create a career listing, can one of my colleagues access it and perform searches?](#)

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Yes. You may share your access code at your own discretion and risk with a colleague, who will then be able to view and edit your firm's profile and all listings associated with the firm, perform searches, and send or respond to messages.

#### [My listing status is Pending. When will it be Active?](#)

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Please allow up to five business days for your listing to become active. As soon as the listing becomes active, we alert you with an email.

#### [Why is my listing inactive?](#)

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Your listing can become inactive if you deactivate it, if the Schwab human capital administrator deactivates it, or if you do not update your listing for 12 months. For assistance please email [sashumancapitalsupport@schwab.com](mailto:sashumancapitalsupport@schwab.com).

### **Search Listings**

#### [Why don't I have access to search for listings?](#)

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You must have an active listing to be able to search for listings. If your listing status is Incomplete, Pending, Deactivated, or if you do not have any active listings, you will not be able to perform any searches.

#### [How do I search?](#)

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From the Search Listings page, select your desired criteria and click the Search button at the bottom of the page. For more results, broaden your search by selecting fewer criteria.

#### [Can I search for a specific listing?](#)

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Yes. If you know the listing ID number of the listing you are searching for, enter it into the Search text field at the top of the Search Listing page.

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### [Can I search for and view other career listings if I have a career listing?](#)

No. Firms with career listings can search for and view candidate listings only.

### [Can I search for and view other candidate listings if I have a candidate listing?](#)

No. Individuals with candidate listings can search for and view career listings only.

### [What is a Candidate with Assets?](#)

A Candidate with Assets is an established investment professional with a transferable book of business who wants to join an RIA firm. When creating their listing, in addition to being viewable on the Schwab Career Opportunity Service, they can indicate if they want it be viewable on the Schwab M&A Listing Service.

### [How do I search for Candidates with Assets?](#)

From the Search Listings page, select your desired criteria. Confirm that the box at the bottom of the page next to "Show Candidates with Assets" is checked. Click the Search button at the bottom of the page. If you want more results, broaden your search by selecting fewer criteria.

## **Contacting Users/Message Center**

### [How do I contact someone on the Career Opportunity Service?](#)

Use the Career Opportunity Service Message Center to contact a candidate or firm with a career opportunity. Simply click the Send Message button at the top of the listing you are interested in.

### [How will I know if someone is trying to contact me through the Career Opportunity Service?](#)

You will receive an email at the address provided in your contact details indicating that you have a message at the Career Opportunity Service Message Center. Click on the link in that email to go directly to the login window for the Career Opportunity Service, and then into the Message Center. You must have an active listing to access the Message Center.

### [How do I reply to a message?](#)

From your Message Center Inbox, click on the message, and then click the Reply button. Enter your text in the Reply window, and click the Send button located below the Reply window.

### [What are the Best Practices when replying to messages?](#)

Everyone benefits from a quick response, so try to respond within 48 hours. Log into the Career Opportunity Service and go to the Message Center to respond. As a best practice, if you don't have time to fully compose your response, just say so, as in the following example: "Thank you for your inquiry. I'll get back to you by the end of the week with a response." It's common courtesy to respond even if you are not interested in having a discussion with someone who has contacted you.

### [How do I view a previously sent message?](#)

Click on the Sent link located in the Message Center box on the right side of your Message Center page.

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### [How do I delete a message from the Message Center?](#)

Messages cannot be deleted from the Message Center. If you have completed a conversation with someone and would like to remove that conversation from your inbox, use the Archive button to move the conversation to your Archive box.

### [How do I save a message that is currently in my Message Center Inbox?](#)

Use the Archive button to move a message or conversation from your inbox to your Archive box.

## Edit/Update Listing

### [How do I change my user name or access code?](#)

Click on the My Profile tab; then click the Edit button at the bottom of the page. Make your desired changes, and click the Submit button at the bottom of the page. Your changes will take effect immediately.

### [How do I change details in my profile?](#)

Click on the My Profile tab; then click the Edit button at the bottom of the page. Make your updates, and click the Submit button at the bottom of the page. Your changes will take effect immediately.

### [How do I update or make changes to my listing?](#)

Click on the My Listings tab, check the box next to the listing you wish to edit, and click the Edit link.

### [How often do I need to update my listing details to keep my listing active?](#)

We encourage you to update your listing as often as necessary to ensure the information is fresh. You must update your listing at least every 12 months to maintain an Active status.

## Terms of Use

### [What are the terms and conditions for users of the Career Opportunity Service?](#)

All users of the Schwab Career Opportunity Service must review and accept the Terms of Use prior to creating a listing. Terms of Use for the Schwab Career Opportunity Service are outlined in the User Agreement. At its sole discretion, Schwab reserves the right to decline, reject, or delete a listing at any time for any reason.

### [Is there a fee to use the Career Opportunity Service?](#)

No. Access to Schwab's Career Opportunity Service is complimentary. Schwab reserves the right, at its sole discretion, to charge fees for this service in the future by changing the Terms of Use.

### [Who can I contact if I have questions or problems with the Career Opportunity Service?](#)

If you have questions about the Career Opportunity Service, please contact the human capital team at [sashumancapitalsupport@schwab.com](mailto:sashumancapitalsupport@schwab.com).

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