

SAC RESOURCES

with clickable links (will need to sign into Schwab Advisor Center)

Service guide

is here to help us succeed

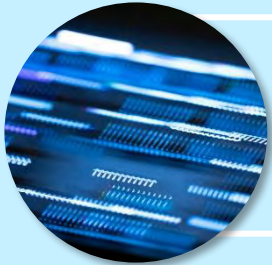


[RIA EdCenter](#) – Multiple training sessions

Introducing >

Weekly Webcasts

Updates to Schwab Technology & More



My goal is to partner with you to optimize your business operations to create a less complicated and easier process for your day-to-day.

Digital Onboarding is **instrumental** in that goal

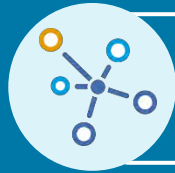
STEP-BY-STEP GUIDES



Digital Onboarding



Breakdown of best practices and ability to see each step needed to complete the process.



Move Money



Explains how to set up move money access for your team and the steps for completing different types of money movements for your clients.



Alliance Support Guide



Shows what the client sees and what is available to them for setting up and utilizing Schwab Alliance.



DocuSign Workflow



While Schwab's digital onboarding is the best, most efficient, and most secure option for giving clients a better experience, we know some items can be complete only via AODS/DocuSign at this time.