



Explore Schwab Alliance at-a-glance

Explore the essential elements of your clients' Schwab Alliance experience.



The screenshot shows the Schwab Alliance client dashboard with the following callouts:

- 1 Primary navigation:** Points to the top navigation bar containing 'Accounts', 'Trade', 'Research', 'Move Money', and 'Products'.
- 2 Secondary navigation:** Points to the secondary navigation bar containing 'Summary', 'Balances', 'Positions', 'Investment Income', 'Corporate Actions', 'Securities Lending', 'History', and 'Statements'.
- 3:** Points to the top right area containing 'Messages', 'Support', 'Profile', and 'Log Out'.
- 4:** Points to the 'Total Value' section, which includes an 'Expandable Total Value chart' and a 'Settings' window.
- 5:** Points to the 'Settings' window for the account, which allows clients to customize their account view.
- 6:** Points to the 'Universal Message Highlights' section, which displays various messages such as 'Day change for Bank accounts is now updating' and 'Documents from your advisor are ready for your review'.

The dashboard content includes:

- Summary:** Total Value of \$4,027.36 with a Day Change of +\$13.45 (0.34%).
- Accounts Table:**

Account Name	Category	Balance	Value	Change
Trade/Transfer ...XXX	Brokerage	\$15.01	\$63.10	+\$0.43 (0.69%)
Limited ...XXX	Brokerage	\$202.77	\$324.25	+\$1.26 (0.39%)
Standard ...XXX	Brokerage	\$847.11	\$3,640.01	+\$11.76 (0.32%)
- Message Highlights:**
 - Day change for Bank accounts is now updating
 - Documents from your advisor are ready for your review