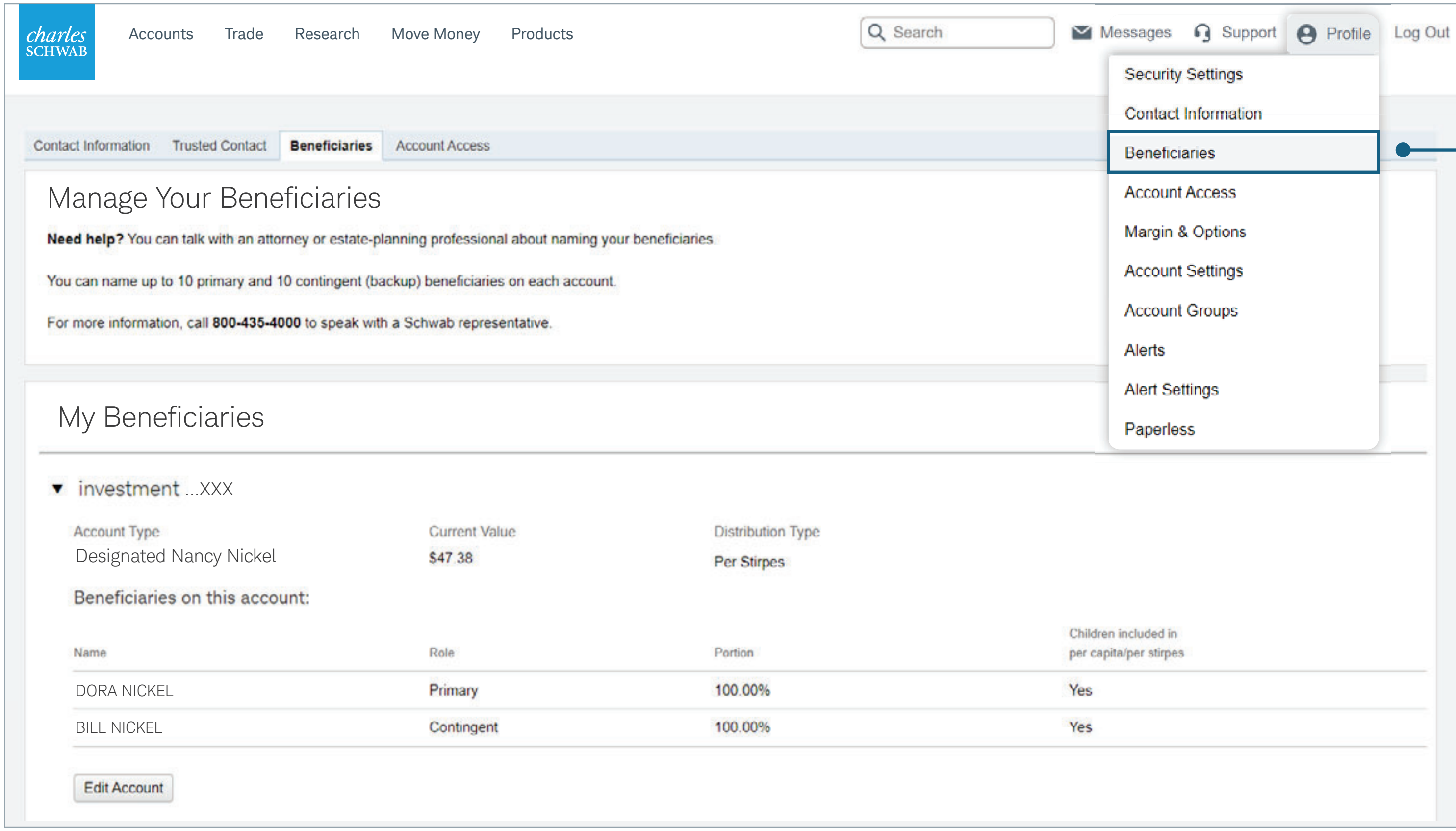
Update beneficiaries

Your clients can name or change beneficiaries on Schwab Alliance. The beneficiaries feature allows clients to see all eligible accounts with beneficiaries in a single location and update them as needed.



Your client clicks the **Profile** icon, then selects **Beneficiaries** from the drop-down menu.

Screenshots are for illustrative purposes only.