



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.

The screenshot shows the Schwab Alliance website interface. At the top, there is a navigation bar with the Charles Schwab logo and links for Accounts, Trade, Research, Move Money, and Products. A search bar and links for Messages, Support, Profile, and Log Out are also present. The 'Profile' icon is open, showing a dropdown menu with options: Security Settings, Contact Information, Beneficiaries (highlighted), Account Access, Margin & Options, Account Settings, Account Groups, Alerts, Alert Settings, and Paperless. The main content area is titled 'Manage Your Beneficiaries' and includes a 'Need help?' section with contact information. Below this is the 'My Beneficiaries' section, which shows a dropdown for 'investment ...XXX' and a table of beneficiaries.

Account Type	Current Value	Distribution Type
Designated Nancy Nickel	\$47.38	Per Stirpes

Beneficiaries on this account:

Name	Role	Portion	Children included in per capita/per stirpes
DORA NICKEL	Primary	100.00%	Yes
BILL NICKEL	Contingent	100.00%	Yes

[Edit Account](#)

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