

Institutional Group 16

Quick Reference Guide



Monday–Friday
7:00 a.m.–5:00 p.m. PT

Service Team Lead

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Service Team

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Building your foundation

- [Service Guide](#) 🔒
- [News and resources](#) 🔒
- [Cybersecurity](#) 🔒
- [RIA EdCenter™](#) 🔒
- [Other Schwab contacts](#) 🔒

Keeping you on track

1. Securely submit documents and related questions, choose **Service Requests** from the **Support** menu in the upper-right corner.
2. Go to the **Status** page on the **Activity** tab to track the progress of requests you've submitted.
3. Respond in real-time to Not-In-Good-Order submissions.
4. Review historical summary of submitted requests.

Looking towards the future

- [Move Money](#) 🔒
- [Digital workflows](#) 🔒
- [Advisor Check Deposit \(ACD\)](#) 🔒
- [Technology adoption dashboard](#) 🔒
- [Live trainings and webcasts](#) 🔒
- [Tools and administration](#) 🔒