Schwab Alliance to add money to account for Clients

1. Client will need to go to www.schwaballiance.com and log in.(if they have never logged in the will have to click on "New User" , they will need their social security number, account number, and the phone number that they registered when the account was opened.)
2. Once logged in they will go to the top of the page and go to the second row and click on "Transfers &Payments"
3. Under "Online Transfer" they will select Cash, then the next area is "From" they will select where the funds are coming from. Under External Accounts if they see their bank then they will click on that. Then they will go to the To and select the account that they will be adding the funds to. Then add the dollar amount, the frequency: one-time, monthly, etc.… If it is into an IRA they will have to remember the max amount they can contribute and will select the year for the contribution. They will then hit continue and then verify the information is correct. The check the box that says " I Agree" then click "Submit".
4. If not, they will click on "Add External Account" (note they will be asked to leave the page- tell them to click "Continue"
5. (they will only be able to bring funds in and not out at this time) Click on "Link an External Account" The client will see their name and account number at the top. A quarter the way down they will check the "yes" box and then go down and add the Routing number and Account number and then select what type of account it is through the drop down. Then select "continue"
6. They will then be required to enter "username, Pin, and password. The check " I Agree" then click "Verify Account" They will then get a message on where their account was instantly or not. If not it may take a couple of days to verify.