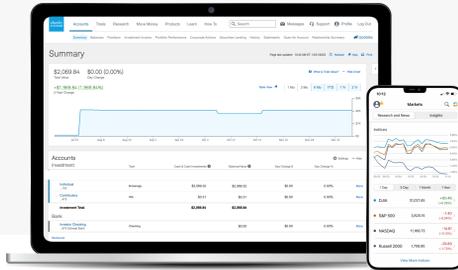




Schwab.com & Mobile App Reference Guide

Use this helpful guide to find the top tools and resources you need to seamlessly manage your accounts and investments digitally. Plus, access helpful video tutorials and step-by-step instructions in our [How To Center](#) for additional support.

To begin, log in to [Schwab.com](#) or open the Schwab Mobile app.



Note: The instructions below for the Schwab Mobile app are for iPhone users. For Android users, where the instructions indicate tapping the More icon **⋮**, you will instead tap the Menu icon **☰** located in the upper left corner of your screen.

Funding Your Account

	Schwab.com	Schwab Mobile App
Where can I make a mobile deposit?	Mobile only	Tap More ⋮ → Tap Deposit Checks (Under Move Money) Watch how-to video
How can I fund my account online?	Click Move Money → Select Online Transfer Watch how-to video	Tap More ⋮ → Tap Transfer Funds (Under Move Money)
How do I transfer my account to Schwab?	Click Move Money → Select Transfer Account	Desktop only

See other ways to move money at [Schwab.com/HowToCenter](#) >

Investing & Trading

	Schwab.com	Schwab Mobile App
Where can I research stocks?	Click Research → Select Stocks Watch how-to video	Tap Markets → Tap Search 🔍
Where can I access Schwab's Personalized Portfolio Builder?	Click Research → Select ETFs or Mutual Funds → Select Portfolio Builder Watch how-to video	Desktop only
Where do I place a trade?	Click Trade → Select All-In-One Trade Ticket Watch how-to video	Tap Trade
Where can I monitor positions?	Click Accounts → Select Positions Watch how-to video	Tap Accounts → Select Desired Account → Tap Positions
How much interest and dividend income is my portfolio generating?	Click Accounts → Select Investment Income	Tap Accounts → Expand View → Slide Total Value graph to the left
How do I create watchlist?	Click Research → Select Watchlist Watch how-to video	Tap Watchlist → Tap More ⋮ → Select Create Watchlist

See other ways you can invest and monitor your portfolio at [Schwab.com/HowToCenter](#) >

Account Management

	Schwab.com	Schwab Mobile App
Where can I view my account balances?	Click Accounts → Select View Balances	Tap Accounts → Select Desired Account → Tap Balances
Where can I access a balance letter?	Click Accounts → Select Balance Letter	Tap More ⋮ → Tap Balance Letters (Under Documents)
How do I get notifications on my mobile device?	Mobile only	Tap Profile Ⓔ → Tap Alert Settings (Under Settings)
How do I change or reset my password?	Click Profile Ⓔ → Select Security Settings → Select Security Credentials → Select Change Password Watch how-to video	Tap Profile Ⓔ → Tap Security Settings (Under Security) → Tap Change Password
How do I update my trusted contacts and beneficiaries?	Click Profile Ⓔ → Select Contact Information or Beneficiaries Watch how-to video	Tap Profile Ⓔ → Tap Beneficiaries <i>View only. Changes must be made on desktop.</i>
Where can I update my personal information?	Click Profile Ⓔ → Select Contact Information Watch how-to video	Tap Profile Ⓔ → Tap My Profile
How do I keep my account secure?	Click Profile Ⓔ → Select Security Settings	Tap Profile Ⓔ → Tap SchwabSafe (Under Security)
How do I authorize additional access to my account?	Click Profile Ⓔ → Select Account Access Watch how-to video	Tap Profile Ⓔ → Tap Security Settings (Under Security) → Tap Third Party Access <i>View only. Changes must be made on desktop.</i>
Where can I view my account statements?	Click Account → Select Statements	Tap More ⋮ → Tap Statements (Under Documents)
How can I go paperless?	Click Profile Ⓔ → Select Paperless Watch how-to video	Desktop only

See additional ways you can manage your account at [Schwab.com/HowToCenter](#) >

Taxes & Required Distribution

	Schwab.com	Schwab Mobile App
Where can I view my tax forms, including my 1099?	Click Accounts → Select Statements → Select Tax Forms	Tap More ⋮ → Tap 1099 Dashboard (Under Documents)
How can I estimate my Required Minimum Distribution?	Click Products → Select Retirement & IRAs → Select Schwab IRA Calculators → Click RMD Calculator Watch how-to video	Desktop only

Debit Cards

	Schwab.com	Schwab Mobile App
How do I lock and unlock my debit card?	Click Support 🗨 → Select Debit Cards & Checks Watch how-to video	Tap Profile Ⓔ → Tap Manage Cards (Under Security) → Toggle Desired Preference Watch how-to video
Where can I order a new debit card?	Click Support 🗨 → Select Debit Cards & Checks	Tap Profile Ⓔ → Tap Manage Cards (Under Security) → Tap Replace Card

Additional Schwab.com Resources & Information



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