

Advisor University®

A modern way to learn



Maximize your firm's potential through innovative learning.

Advisor University helps you get the most out of our platform, whether you're focused on creating operational excellence or enhancing the experience for your clients.

This redesigned platform now offers a comprehensive library of resources to help employees learn based on their preferences and roles, whether they are new to your firm and need to learn the basics, or tenured and looking to implement new processes to efficiently serve clients.

New platform, new features

Recommended learning



Recommended learning paths to achieving specific learning objectives

On-demand multimedia



Intuitive navigation to explore the content library, with 100 on-demand courses in multimedia formats

Instructor-led courses



Live instructor-led courses for a more extensive learning experience

Course calendar view



Course calendar for easy viewing of the available instructor-led courses

To get started, visit [advisoruniversity.com](#)

[> Support >](#)

Explore new features



Recommended learning featured on the new homepage directs you to learning paths designed to offer curricula to develop the needed skill sets based on your role, including:

- New advisor
- Digital capabilities
- New operations professional

Requesting Journals

Quick Start Guide – Requesting Journals

Using the Move Money functionality on Schwab Advisor Center®, your firm can save valuable time by processing a wide range of money movement requests online. You can submit check, journal, wire, and Schwab MoneyLink® requests, and view status information quickly and easily. This guide focuses on requesting a journal for a client.

The Move Money Dashboard

Select the Move Money tab on the top of Schwab Advisor Center's landing page to be directed to the move money dashboard.

From there, enter the client's account number and select Request Journal-One Time.

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Multimedia formats offer a variety of resources to support different learning styles.

- Quick start guides provide step by step instructions with visuals.
- Instructor-led trainings provide a interactive learning experience.
- Short instructional videos illustrate Schwab's processes.



Disclosures:

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