Charles Schwab Overview

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Charles Schwab Institutional Client Overview

Schwab Institutional is the custodian that holds your investment account assets managed by Financial Gravity Asset Management. To view all of your Schwab accounts in one place, log into the Schwab Alliance client portal.

How to log into Schwab

- Go to www.schwaballiance.com > Next, select New Schwab user, then follow the prompts.
- Schwab Alliance Login Instructions
- How to update your Contact information, Trusted Contacts and Beneficiaries (44 second short video)

If you are still having trouble logging in, please call Schwab directly at (800) 515-2157. They have a tech team that helps our clients with login issues.

Using the Schwab Mobile App

Download the Schwab Mobile app. To download the app, visit the app store for your mobile device and search for Schwab Mobile.

Paperless delivery

We encourage you to enroll in paperless delivery. To enroll, log into Schwab Alliance and select the Profile icon on the upper right, then choose Paperless from the dropdown menu. Select the Enroll in Paperless checkbox next to each document type that you'd like to receive electronically.

How to add an authorized view

(For example - Household view - Husband/wife) How to add and manage an authorized user short video

- Log in to schwaballiance.com > Click Profile in the upper right-hand corner of the screen > Next select Account Access from the dropdown menu. > Next Click on "Give Account Access"
- Next Give Account Access - Options Include - (1) View-only access, (2) Limited trading authority and (3) Full trading authority.
- Next Select the financial account you want to give access to > Next, provide information on the person you would like to give access to - Full Name, Contact Details, Email. > Review submission and authorization details.
- Next the authorized user will get an email with the invitation to gain access to your account(s) to continue their portion of the enrollment process.