From:	Casey Ryder
To:	Casey Ryder
Subject:	Schwab Integration Update | Thursday 9/7
Date:	Thursday, September 7, 2023 5:28:20 PM
Attachments:	image001.png

Hello everyone,

Please note that all Advisors are now officially set up to view their accounts at Schwab online and all new Schwab master codes (previously called rep codes at TD) have been linked into Fusion. All Advisors can open accounts or submit service requests through Fusion as usual and will now see their new master code in the new business tool when assigning TBP Non-Wrap fee schedules going forward at Schwab. Reminder that all requests should flow through Fusion and work should *not* be created direct at Schwab.

There is a video on our website under Operations > Charles Schwab integration that covers some of the differences between the TD application and the Schwab application. We recommend watching this video prior to opening accounts at Schwab so you're aware of what to look out for on the Schwab paperwork.

Regarding viewing accounts in Fusion, staff over at Fusion are still working on making sure all account values and performance history are integrating into their system correctly. If you see a difference in a value at Schwab vs. Fusion please don't be alarmed and note that Schwab and Fusion's technology teams are working together to make sure everything is updating accurately.

Advisors are welcome to submit trade related tickets and those will be processed as usual. The trading system used behind the scenes has the correct values even though the Accounts Overview visible to advisors may not yet. The tools are separate but please note that account trading is underway and active. If you have any questions on a specific account or are unsure of whether to submit a trade ticket for something please feel free to ask and we can help.

Please look out for an FAQ and clarification email with more Schwab updates as well as the Schwab Integration page of our website with FAQs as well. We appreciate your patience during this transition period while we continue to learn about the way Schwab operates and strive to keep things running smoothly!

Thank you,

Casey Ryder
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WEALTHWATCH ADVISORS