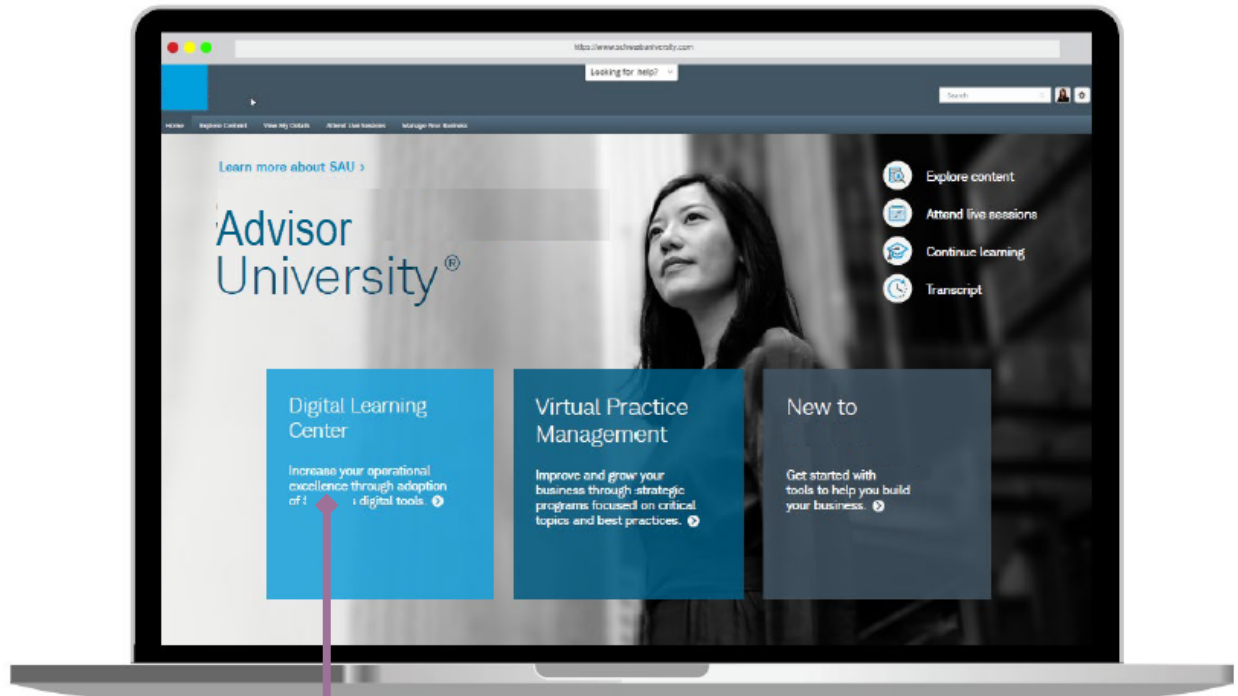


# Learning Technology User Experience



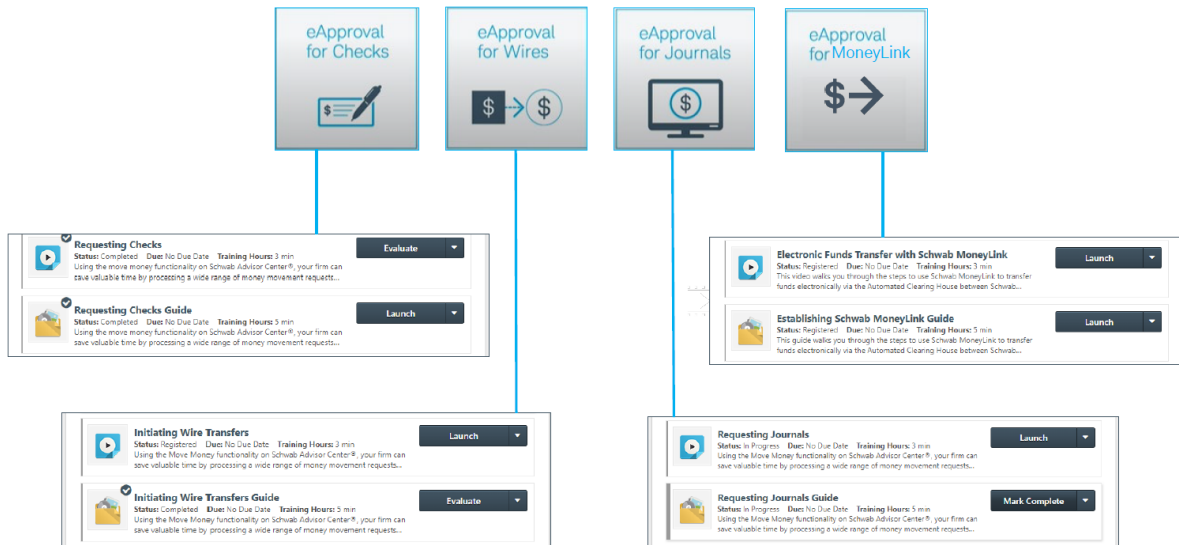
**DLC Hub**

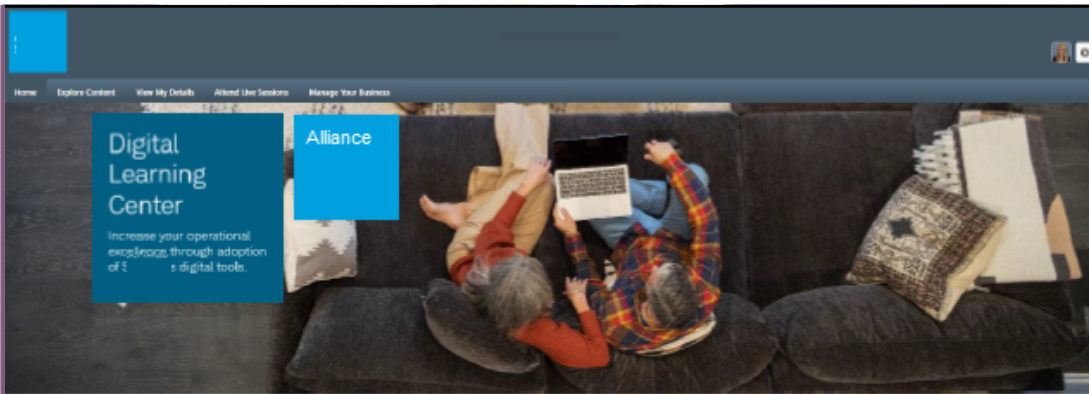
This detailed view of the Digital Learning Center hub page features a navigation bar with 'Home', 'Explore Content', 'View My Details', 'Attend Live Sessions', and 'Manage Your Business'. The main content area is divided into several sections: a large 'Digital Learning Center' banner with the sub-headline 'Increase your operational excellence through adoption of digital tools.'; a grid of four blue tiles for 'Alliance', 'Move money', 'Open an account', and 'Account maintenance', with 'Move money' highlighted by a pink border; a video player featuring a woman, identified as 'Senior Vice President of Integrated Solutions, Schwab Advisor Services'; and a section titled 'Want to see how you're doing today?' with links for 'Access your Score card' and 'Technology Adoption Guide'.

# Learning Pathway Landing Page

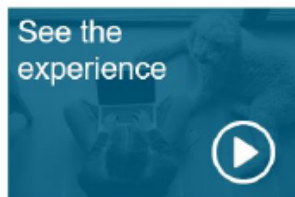
The screenshot shows a landing page with a navigation bar at the top containing links for Home, Explore Content, View My Details, Attend Live Sessions, and Manage Your Business. The main content area features a large banner for 'Move money resources' with the text 'Start your digital journal with Move Money.' and 'Move Money Dashboard on Advisor Center®'. To the right of the banner are links for 'Move Money tool >' and 'Move Money Dashboard quick start guide >'. Below the banner are four icons representing different eApproval tools: 'eApproval for Checks', 'eApproval for Wires', 'eApproval for Journals', and 'eApproval for MoneyLink'. To the right of these icons is a video thumbnail titled 'Using eSignature' with a link 'Guide to using eApproval tools >'. A purple arrow points from the bottom of the banner area down to the curriculum diagram below.

## Learning Pathway Curriculum





Our online and mobile platform is designed exclusively for clients of independent advisors. The experience features your firm's branding and contact information, and offers your clients easy, secure access to their account information online or on the go.



## Tools for you

### Get Started

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Best practices



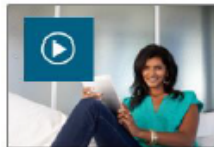
Navigate site



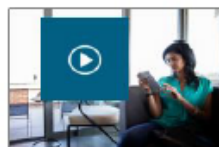
Customize client views



Add your logo



Enroll your clients



Enroll in paperless

### Set-up your clients

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### Support your clients

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Tips and  
trouble  
shooting >

Client  
Learning  
Center  
guide >

Enrolling in  
MoneyLink >

Mobile app  
to deposit  
checks >

## Resources for your clients

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Alliance:  
Simple Fast Secure >



Client Learning  
Center >

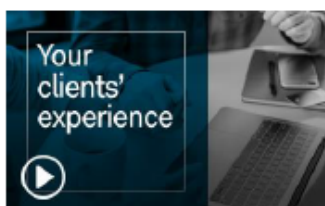


Can't find what you are looking for? Search for  
more Alliance resources.



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View a demonstration of the experience for you and your clients.



View a step-by-step walkthrough of the experience for you and your clients.



©2018 RIA Benchmarking Study from Charles Schwab, dated January to March 2018. Study contains self-reported data from 1,261 firms. Participant firms represent various sizes and business models (categorized into 12 peer groups—7 wealth manager groups and 6 mass manager groups)—by AUM size. Median results for all firms with \$250 million or more in AUM. Past performance is not an indicator of future results.

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