

How To Check Your Account's Cash Balance in Schwab Alliance

1. From the Schwab Alliance homepage, scroll to find the name of the account you are looking for:

The screenshot shows the Schwab Alliance homepage. At the top, there is a navigation bar with links for Accounts, Trade, Research, Move Money, Products, Learn, and How To. Below this is a secondary navigation bar with links for Summary, Balances, Positions, Investment Income, Portfolio Performance, Corporate Actions, Securities Lending, History, Statements, Open An Account, and Relationship Summary. A search bar and links for Messages, Support, Profile, and Log Out are also present. A notification banner at the top states: "Need to provide individuals access to view your accounts? Click here." The main content area is titled "Summary" and includes a "Total Value" section showing a total value of \$130,417.59, a day change of +\$56.66 (+0.04%), and a 6-month change of +\$90,483.17 (+226.58%). Below this is a table of accounts, with the "Accounts Investment" header circled in red. The table lists three accounts: Cash & Cash Investments, Designated Beneficiary IN, and Brokerage. A market data bar at the bottom shows indices like DJIA, NASDAQ, S&P 500, and Russell 2000.

Accounts Investment	Type	Cash & Cash Investments	Account Value	Day Change \$	Day Change %	More
		\$326.53	\$17,533.32	+\$27.56	+0.16%	More
		\$80.26	\$39,641.61	+\$17.69	+0.04%	More
Designated Beneficiary IN ...953	Brokerage	\$165.99	\$25,309.68	+\$11.41	+0.05%	More

2. You can see the cash balance from the Summary page:

This is a detailed view of the 'Accounts Investment' table. The 'Cash & Cash Investments' column is circled in red. The table is organized into sections: 'Accounts Investment', 'Investment Total', and 'Employer Sponsored'. The 'Employer Sponsored' section includes 'Roth 401k' and 'Trad 401k' accounts.

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		\$80.26	\$39,641.61	+\$17.69	+0.04%	More
Designated Beneficiary IN ...953	Brokerage	\$165.99	\$25,309.68	+\$11.41	+0.05%	More
Investment Total		\$572.78	\$82,484.61	+\$56.66	+0.07%	
Employer Sponsored						
Roth 401k ...313	Retirement	\$133.57	\$22,922.66	\$0.00	0.00%	More
Trad 401k ...545	Retirement	\$9.00	\$25,010.32	\$0.00	0.00%	More
Employer Sponsored Total		\$142.57	\$47,932.98			

- Alternately, click on the blue hyperlink of the account, which will bring you to that specific account summary.

Accounts Investment Settings ^

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Employer Sponsored Total		\$142.57	\$47,932.98			

Which leads to this view:

charles SCHWAB Accounts Trade Research Move Money Products Messages Support Profile Log Out

Summary Balances Positions Investment Income Corporate Actions Securities Lending History Statements

Positions

Updated: 03:25:26 PM ET, 01/25/2024 Refresh Help Export Print

Designated Bene Ind... 953 View Realized Gain/Loss Return to legacy view

Group by Security Type Condensed Table View

Independent Investment Advisor ASPEN CAPITAL MANAGEMENT Contact your advisor *Not affiliated with Schwab

Account Summary

Account Value	Cash & Cash Investments	Market Value	Day Change	Cost Basis	Gain/Loss
\$25,308.58	\$165.99	\$25,142.59	+\$10.31 (+0.04%)	\$25,074.77	+\$67.82 (+0.27%)

Positions Details *

Symbol	Name	Quantity	Price	Price Change	Market Value	Day Change	Cost Basis	Gain/Loss	Ratings	Reinvest?	% of Acct
▼ ETFs & Closed End Funds											