

Nickname and organize accounts

To customize the **Summary** page, your client can nickname accounts, group accounts, and more.

The screenshot shows the Charles Schwab Summary page. The top navigation bar includes 'Accounts', 'Trade', 'Research', 'Move Money', and 'Products'. The 'Summary' tab is selected. The main content area displays the total value (\$4,027.36) and day change (+\$13.45, 0.34%). Below this is a table of accounts:

Accounts	Type	Cash & Cash Investments	Balance/Value	
IRA				
Trade/Transfer ...XXX	Brokerage	\$15.01	\$63.10 +\$0.43 (0.69%)	More
Trust				
Limited ...XXX	Brokerage	\$202.77	\$324.25 +\$1.26 (0.39%)	More
Brokerage				
Standard ...XXX	Brokerage	\$847.11	\$3,640.01 +\$11.76 (0.32%)	More

The 'Settings' button is highlighted in the Accounts table. The 'Summary Settings' dialog box is open, showing options for 'View Accounts as' (Grouped/Ungrouped), a table of account settings, and an 'Add a Group' section.

Callout 1: To nickname accounts, your client clicks **Settings** on the **Summary** page of the **Accounts** tab...

Callout 2: ...to open the **Summary Settings** window. The client can then customize how they want to view their account(s).



Tip

If an account is missing from a client's **Schwab Alliance** view, first check to see whether the client can choose **Show Online** in the **Summary Settings** window. If the account does not appear, you or your client should contact the Schwab Alliance Service Team.