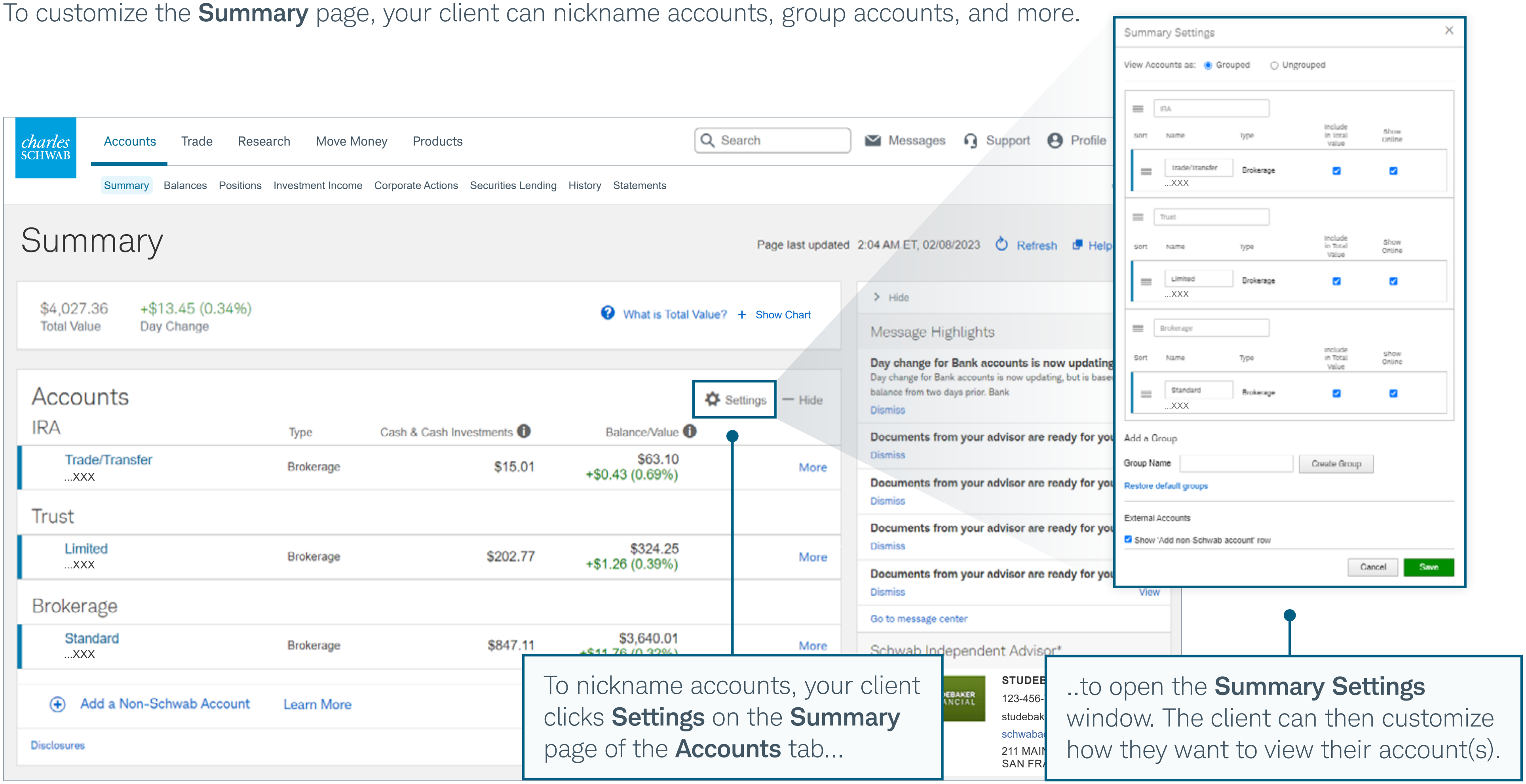
Nickname and organize accounts

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



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.