

## SETTING UP YOUR SCHWAB ADVISOR MOBILE CONNECT APP

### PROCESS OVERVIEW

Your service team at Schwab Performance Technologies® (SPT) will guide you through the entire setup process for launching your custom mobile app. For your convenience, you can use this document to help you prepare for tasks that your firm needs to complete.



#### Note

- All steps must be completed before SPT can create and publish on your behalf.
- After you have completed all the steps, it will take approximately 3-4 weeks to build your app. Once your app is developed, SPT will submit it to Google Play™ and Apple® App Store<sup>SM</sup> for approval and publication. This submission process may take an additional two weeks.

### STEP 1: CREATE MOBILE APP DEVELOPER ACCOUNTS

You are required to create, activate, and maintain developer accounts for both Google Play and Apple App Store. During the account setup process, you will need to delegate publishing authority to SPT in order to assist with the completion of your app. Use the Apple App Store and Google Play Account Checklists in the following pages to assist you in creating and managing the developer accounts.



#### Note

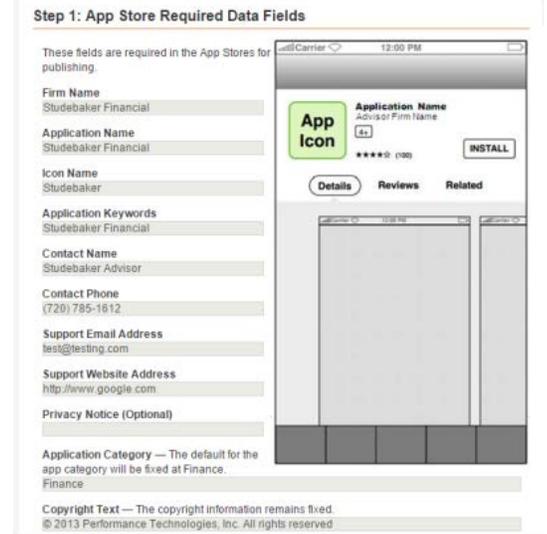
- It may take up to 4-5 weeks for Apple to approve your account. We recommend initiating this process as soon as possible.
- Both Apple and Google charge for creating developers accounts. These fees are NOT associated with or payable to SPT.
  - **Apple:** \$99/year
  - **Google:** \$25 one-time registration fee
- Google and Apple revise their developer agreements annually and will notify you directly that you need to review and accept the new terms in order for your app to be made available. **To continue allowing SPT to upgrade your mobile app and prevent it from being removed from Google Play or Apple App Store, be sure to respond to the developer account notifications in a timely manner.** SPT cannot perform this action on your behalf.

## STEP 2: CREATE AND SUBMIT APP CONTENT

The Advisor Customization Portal allows you to make real-time content updates at any time. With it, you can:

- Add content required for the initial setup
- Input content for your news section
- Customize the enrollment email sent to your clients
- Update your contact information
- Manage which clients have access to the app
- View monthly user activity reports

Access the portal at <https://schwabpt.com/products/mobile> and complete the Initial Setup page with information that will be used to publish your app. For more details, refer to the [Advisor Customization Portal User Guide](#).



**Step 1: App Store Required Data Fields**

These fields are required in the App Stores for publishing.

Firm Name  
Studebaker Financial

Application Name  
Studebaker Financial

Icon Name  
Studebaker

Application Keywords  
Studebaker Financial

Contact Name  
Studebaker Advisor

Contact Phone  
(720) 795-1612

Support Email Address  
test@testing.com

Support Website Address  
<http://www.google.com>

Privacy Notice (Optional)

Application Category — The default for the app category will be fixed at Finance.  
Finance

Copyright Text — The copyright information remains fixed.  
© 2013 Performance Technologies, Inc. All rights reserved.

## STEP 3: APPROVE PROOFS

After you submit your initial setup information in the portal, SPT will produce a PDF file with three examples of how your logo will look in your app. This may take up to five business days.



### Note

If you have any changes, you must notify SPT within three business days of receiving the proofs. One final PDF will be produced for your approval. **This process only includes one round of revisions.**

## STEP 4: PROMOTE YOUR APP

You will be notified as soon as your app is published by Apple and Google. Once your app is live, you can begin inviting clients and prospects to download and use it. The customization portal includes tools to help you create and manage user accounts for your mobile app. See the Advisor Customization Portal User Guide to learn how to use these features.

## APPLE APP STORE ACCOUNT REGISTRATION CHECKLIST

Use this section to help you complete step 1.



### Important

You will need a valid D-U-N-S® Number and profile to enroll in the Apple Developer program. Go to the [Dun & Bradstreet website](#) to request one. After requesting a D-U-N-S Number, please allow up to 5 business days to receive your number from D&B. Once you receive your D-U-N-S Number, allow up to 2 business days for Apple to receive your information from D&B. After this period, you may enroll as a company/organization in the Apple Developer Program.



### Note

If you need help performing any of the steps below, go to the [Apple Developer Support Center](#).

### TASKS

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- Create an Apple ID at the [Apple Developer registration page](#).  
You need an Apple account to register for a developer account. Since you are creating a developer account for your firm, consider creating a new Apple account for your firm rather than using a personal account.
- Register as an Apple Developer.  
Sign in to the [Apple Developer registration page](#) using the newly created Apple ID. Accept the **Registered Apple Developer Agreement** and enter in some basic information to complete the registration.
- Enroll in the Apple Developer program.
  - Navigate to the [Apple Developer Member Center login page](#). Click on the **Programs & Add-ons** link in the navigation bar.
  - On the Program Summary page, select the **Join Today** button next to the iOS Developer Program option and then click **Enroll Now** to begin the enrollment process.
  - Sign in using the existing Apple ID for your firm and choose **Company/Organization** as the account type. Verify your legal signing authority for the firm, fill out your contact information, and click **Continue**.
  - Select **Company** as the Organizational Type and then enter in the rest of your firm's details, including the D-U-N-S Number. Click **Continue**, verify that the information entered is correct and click **Continue** again.
  - Select the **iOS Developer Program** option and click **Continue**. Proceed until you complete the enrollment process. You'll receive an email from Apple regarding the enrollment process and further instructions.

## TASKS

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- Add SPT as a user to the Apple Developer website.
  - Login to the [Apple Developer website](#). Since you are setting up the account, you will be logging in as the Agent role.
  - Select **Member Center** from the menu bar and on the next page select **People** navigation bar.
  - Click the **Invitations** link from the menu on the left and then click the **Invite Person** button.
  - Next, fill in the **Contact Information** section with the following:
    - **First Name** – [SPT](#)
    - **Last Name** – [Admin](#)
    - **Email Address** – [MobileConnectTech+yourcompanydomainname@schwab.com](#)

Make sure to update the *yourcompanydomainname* text to your firm name on your company's website address. For example: Schwab's domain name is [www.schwab.com](#), therefore the email address would be [MobileConnectTech+schwab@schwab.com](#).
  - Select **Admin** in the Access and Roles section and then click **Send Invitation**. A confirmation and account activation email will be sent to SPT.

- Add SPT as a user to the iTunes® Connect website.
  - Login to the [iTunes Connect](#) website and select the **Manage Users** option in the lower left hand corner. Click on the **iTunes Connect User** user type and then click on the **Add New User** button in the Manage Users screen.
  - The Add New User window will appear. Fill in the Personal Details section with the following:
    - **First Name** – [SPT](#)
    - **Last Name** – [Admin](#)
    - **Email Address** – [MobileConnectTech+yourcompanydomainname@schwab.com](#)



### Important

Make sure to update the *yourcompanydomainname* text to your firm name on your company's website address. For example: Schwab's domain name is [www.schwab.com](#), therefore the email address would be [MobileConnectTech+schwab@schwab.com](#).

- Click **Continue**, click **OK** to the Apple ID confirmation message, and then click **Continue** again on the Add New User Page.
- Select the **Admin** column checkbox in the Roles page and then press **Continue**.
- A new tab will open on the screen prompting you to select the notification type for the user you added. Select the **All Notifications** checkbox for the appropriate territory and then press **Continue**. This will allow SPT to receive notifications regarding the status of Apple's approval of your app; you will also receive these email notifications.
- An activation email is sent to SPT. Once SPT accepts, the SPT account will show up in your Manage Users list and will be associated with your developer account. Apple setup is now complete.

## GOOGLE PLAY ACCOUNT REGISTRATION CHECKLIST

Use this section to help you complete step 1.



### Note

If you need help performing any of the steps below, go to the [Google Play Developer Help Center](#).

### TASKS

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- Create a Google Account at the [Google Account registration page](#).  
You need a Google account to register for a developer account. Since you are creating a developer account for your firm, consider creating a new Google account for your firm rather than using a personal account.
- Register as a Google Play Developer.
  - Sign in to the [Google Play Developer Console login page](#) using the newly created Google account.
  - After accepting the Google Play Developer distribution agreement, the Google Wallet™ window will appear prompting you to make a one-time payment of \$25 to open your Google account and associate it with Google Wallet. Select the **Accept and Continue** button when you are done.
  - You will receive a confirmation email once the payment has processed.
- Complete your Google Play Developer account details.  
Navigate to the [Google Play Developer Console login page](#) and in the **Complete your Account Details** section, enter in your firm's information. Select the **Complete Registration** button.
- Add SPT as a user to the Google Play Developer website.
  - On the Developer Console page, select the gear icon on the left navigation menu and then select **User Accounts and Rights**. Select the **Invite New User** button.
  - Enter the email address: [MobileConnectTech+yourcompanydomainname@schwab.com](mailto:MobileConnectTech+yourcompanydomainname@schwab.com)



### Important

Make sure to update the *yourcompanydomainname* text to your firm name on your company's website address. For example: Schwab's domain name is [www.schwab.com](http://www.schwab.com), therefore the email address would be [MobileConnectTech+schwab@schwab.com](mailto:MobileConnectTech+schwab@schwab.com).

- Grant administrator permissions to SPT to log in and turn off the ability to view financial data. Click the **Send invitation** button. An invitation email will be sent to SPT. You'll receive an email once SPT accepts your invitation.
- Log into the [Google Play Developer Console](#), select the gear icon on the left navigation menu, and then select **User Accounts and Rights**. Under the column labeled **Actions**, click the dropdown for the SPT account and select **Grant Access**. Google setup is now complete.

## LIMITATIONS

By using this document and engaging in the app marketplace setup process, you acknowledge and agree to the following on behalf of yourself and your firm:

This document is subject to the terms and conditions of the Application License and Services Agreement (“Agreement”) between Advisor and SPT, including provisions governing Advisor's authorization of SPT to act as Advisor's agent in connection with the creation and publication of Advisor's app.

While SPT has tried to make this document accurate, the app marketplaces may change their processes without notice to SPT or Advisor. Thus SPT cannot guarantee the accuracy of this document. If the descriptions or instructions appear inaccurate or unclear, please contact SPT.

The app marketplace setup process will require you to agree to various agreements and terms and conditions. You should read those agreements and terms and conditions carefully and consult your own legal counsel. SPT does not render legal advice, and this document should not be construed as rendering any legal advice.

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