WHAT CAN I EXPECT?

Your Schlindwein Associates Digital Advice portfolio is only a few simple steps and about 20 minutes of your time away. Just click on "Institutional Intelligent Portfolios®," and begin your investing journey. Wondering what the process is like? Here's a preview of what you can expect to be asked and what you'll receive. You will:

- Answer a few questions about your personal goals, investment experience and preferences.
- Select an account type (e.g., individual taxable, IRA).
- Receive a recommended personal portfolio based on your inputs.
- Experience a streamlined and automated account-opening process that will gather basic personal information (e.g., name, U.S. permanent residence address, email address, tax ID).
- Open a new Schwab account and select from options provided for funding your new account.
- Have investments made and be on your way to achieve your goals.