

ASG

Team 1

Quick Reference
Guide



855-943-6151



Monday–Friday

8:00 a.m.–6:00 p.m. ET

Service Team Manager

Kevon Blair

407-806-1027

kevon.blair@schwab.com

Service Team Lead

Sal Picascio

407-462-1147

sal.picascio@schwab.com

Get the right person on the line the first time—with voice assistant

With a simple phrase, your call will be directed to a service professional who can answer your questions. Use this [tip sheet](#) as a guide for effectively navigating our voice assistant system.

Transition your clients to digital; we can help

Schwab Advisor Center[®] has digital tools and resources to help you onboard new relationships, support and serve your clients, and scale your business. Explore [What's New](#) today for the latest technology updates and enhancements.

Service requests

1. Go to schwabadvisorcenter.com .
2. Use the **Status** page on the **Activity** tab to track the progress of requests you've submitted.
3. To securely submit documents and related questions, choose **Service Requests** from the **Support** menu in the upper-right corner.

Schwab Advisor Center resources

- [Service Guide](#)
- [Move money at-a-glance](#)
- [News and resources](#)
- [Live trainings and webcasts](#)
- [RIA EdCenter™](#)

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