Pittenger & Anderson, Inc.
REGISTERED INVESTMENT ADVISOR

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Online access

By Elizabeth Sydzyik

In today's world where everything seems to be online, you might be hesitant to set up yet another login that requires a fancy user ID, unique password with 8-16 characters, and a secret question about which street you lived on when you were five years old!

At P&A we understand the struggle. However, when you become our client, we will ask you to sign up for online access to your accounts because it is mutually beneficial. Since we believe in being transparent, here are three ways to keep tabs on your P&A-managed accounts online.

Schwab Alliance

This is online access directly through our preferred custodian Charles Schwab's website for advisory clients. We strongly encourage you to set up a Schwab login as it allows you to take actions on your accounts (update your profile, change your address, move money, etc.) and easily access important documents (tax documents, statements, etc.). Schwab has partnered with DocuSign for electronic signatures on paperwork, but a Schwab Alliance login is required. DocuSign is most often the quickest and most secure way to sign forms.

Schwab Mobile App

If you are a smart phone user, Charles Schwab also offers online access to your accounts through their mobile app. One other cool feature is Schwab Mobile Check Deposit, which we wrote about on this blog last year. This allows you to take a picture of a check and have it deposited to your Schwab account. Once you have downloaded the app, simply enter your Schwab Alliance credentials to gain access. Here is a more detailed PDF that shows how to download the app and to link it to your account.

P&A Portal & App

The P&A client portal gives you access to your accounts using the same portfolio management software we use. When you first login, there is a dashboard view to give you the highlights. You can also dive deeper and run reports that show your account performance, recent transactions, and current holdings.

Lastly, you will find a Document Vault where we post quarterly statements, billing statements, and financial plans. You also can upload documents to the Vault, so this becomes a safe and convenient way to share sensitive information that you wouldn't want to email. We also offer the P&A Portal via the P&A App which can be found on the Apple App Store or the Google Play Store for Android. For more info about the P&A Client Portal, see this past blog post or the portal page on our website.

If you do not have a Schwab Alliance login or a P&A Portal and would like to set one up, please contact your Lead Advisor or Service Advisor at P&A. They can send you the link and walk you through the process as well as answer any questions you may have about the features available.

For concerns about cybersecurity, please visit our blog posts:

- Your cybersecurity
- Cybersecurity & identity theft

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