CASH MANAGEMENT ACCOUNTS

Investments & Everyday Cash, Working Together

Your investments have a plan. What about your everyday cash?

Preparing for what's next

As we plan for your upcoming transition, it may be a good time to review where your income lands, how you pay everyday bills, and where you keep available cash.



MORE THAN AN INVESTMENT ACCOUNT

A Cash Management Account (CMA) adds banking features to your existing investment account, creating a convenient home for your money. Your cash can earn interest while it waits to be saved, spent, or invested.



EVERYDAY CASH TOOLS

Direct deposit
Check writing
BillPay
Debit card
Mobile payments



UNLOCK EVEN MORE BENEFITS

Optional premium tiers may include Visa concierge service, higher cash access, travel protection, price protection, rental car benefits, dedicated statement reporting, and more.

Cash and investments, better together

Centralizing more of your income, everyday spending, and available cash alongside your investments can provide you:

TRUSTED SERVICE	**Service You Already Know** Extend the trusted, personalized service you rely on for investments to more of your everyday financial needs.
MORE CONTEXT	**Advice That Considers More** Bringing investments and everyday cash together gives your financial professional more context when helping you pursue your goals.
ONE CONNECTED HUB	**Your Money, Where You Need It** Direct income toward savings, spending, and investment goals in one connected place as you plan together.
NO BREAKUP REQUIRED	**Keep the Bank That Works for You** You do not have to leave your current bank behind. Link it to your investment account and use it where it continues to serve you well.