

**PRECISEFP / SCHWAB ADVISOR CENTER MAPPING TABLE**

Schwab Section	PreciseFP Section	Required	Comments
Contacts	Client Details		<i>Exports client/co-client details</i>
Schwab Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Middle Name	Client Details/Personal Details/Middle Name		
Last Name	Client Details/Personal Details/Last Name	Yes	
Date of Birth	Client Details/Personal Details/Birthdate		
Driver's License Number	Client Details/Driver's License/Number		
Driver's License Issue Date	Client Details/Driver's License/Issue Date		
Driver's License Expiration Date	Client Details/Driver's License/Expire Date		
Driver's License State	Client Details/Driver's License/Jurisdiction(state)		
Driver's License Country	Client Details/Driver's License/Jurisdiction(country)		
Email Address	Client Details/Contact Details/Email	Yes	
Phone (Mobile)	Client Details/Contact Details/Mobile Phone	Yes	
Phone (Home)	Client Details/Contact Details/Home Phone		
Phone (Business)	Client Details/Contact Details/Work Phone		
Address	Client Details/Contact Details/Address	Yes	
Address Type	<i>Home</i>	Yes	
Employer Name	Employment & Income/Employment/Employer		
Occupation	<i>Other</i>	Yes	
Occupation (Other)	Employment & Income/Employment/Title / JobPosition		
Is director	<i>False</i>	Yes	
Is employed by security or broker	<i>False</i>	Yes	

Schwab Section	PreciseFP Section	Required	Comments
Contacts	Children		<i>Exports Children details</i>
Schwab Field	PreciseFP Field	Required	Comments
First Name	Family Members/Children/First Name	Yes	
Middle Name	Family Members/Children/Middle Name		
Last Name	Family Members/Children/Last Name	Yes	
Date of Birth	Family Members/Children/Birthdate		
Mobile Phone Number	Family Members/Children/Phone	Yes	
Address	Family Members/Children/Address	Yes	
Address Type	<i>Home</i>	Yes	

Schwab Section	PreciseFP Section	Required	Comments
Contacts	Other Family Members		<i>Exports Other Family Members details</i>
Schwab Field	PreciseFP Field	Required	Comments
First Name	Family Members/Children/First Name	Yes	
Middle Name	Family Members/Children/Middle Name		
Last Name	Family Members/Children/Last Name	Yes	
Date of Birth	Family Members/Children/Birthdate		
Mobile Phone Number	Family Members/Children/Phone	Yes	
Address	Family Members/Children/Address	Yes	
Address Type	<i>Home</i>	Yes	