SCHWAB
RETIREMENT
TECHNOLOGIES®
MOBILE APPS:
OFFER YOUR
CLIENTS THEIR
OWN MOBILE APPS.



Participants can look at an illustrated view of their investment performance.

These customizable mobile apps are powerful tools, developed specifically for independent recordkeepers like you. Exclusively available to you, they can help deepen your relationship with plan sponsors and create value for plan participants.

Plan sponsors will appreciate Schwab Retirement Technologies (Schwab RT) Mobile Apps because the apps give participants a fast and convenient way to view their workplace retirement information right from their iPhone® or Android™ smartphone.

With Schwab RT Mobile Apps, plan participants can:

- · See current investment information, such as investment balances and cumulative rates.
- Access their transaction history, including payroll contributions and other activities.
- · Easily view plan administrator contact information.

What's more, the top of each page in the apps can display the plan sponsor's name, so you're offering clients mobile apps that are uniquely their own.

Get Schwab RT Mobile Apps now.
Call Schwab RT Client Services at 1-800-752-9029.



## It's safe.

All confidential account information is protected from unauthorized access at all times. Each session requires a login with a personal user ID and password—the same way a participant accesses their account at work.

All communications are also protected by the Secure Sockets Layer (SSL) protocol. Account numbers are never displayed, and no private information is held on the phone after logout. As an added safeguard, the current session expires after 10 minutes of inactivity, automatically closing the session.



A personal user ID and password help protect account information from unauthorized access.

## It's a way to give your clients more.

Schwab RT Mobile Apps are an easy way for you to give your clients more. With these premier apps, you can build loyalty, differentiate yourself from your competitors, and create a presence for yourself in app stores.



Participants can view current investment information, such as their investment balance.



Easy-to-read, color-coded charts depict investment balances and elections.



Transaction history shows withdrawals, transfers, matching contributions, and pre-tax contributions.

## It's for you.

Best of all, as an ASP client, your first Schwab RT mobile app is complimentary.\* It's yours as part of our commitment to deliver solutions for retirement plan service providers to help them improve participant outcomes at retirement.

## Get Schwab RT Mobile Apps now. Call Schwab RT Client Services at 1-800-752-9029.

\*Schwab Retirement Technologies® Mobile Apps are available only to Schwab RT clients. Your first Schwab RT mobile app is complimentary. For additional apps, licensing and quarterly maintenance fees may apply. Call Schwab RT for more information about pricing.

Account data shown is for illustrative purposes only. This is not a recommendation.

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