



Next Generation Distribution Processing from Schwab Retirement Technologies®

Schwab RT improves recordkeeping efficiencies by reinventing the way distributions from retirement accounts are processed and tracked for terminated employees.

Features and Benefits

- Streamlines recordkeeper's processing of lump sum distribution requests containing multiple disbursement instructions
- Supports flexibility for recordkeepers to assess multiple fees for a lump sum distribution request
- Provides system warning to recordkeepers when key participant contact information has changed prior to processing distribution request
- Tracks taxability of deemed loans, and outstanding loan balances across Non-Roth and Roth sources
- Includes a separate option to control timing and aggregation all distribution requests for trading
- Provides the convenience of an online dashboard for recordkeepers, plan sponsors, and advisors to review distribution activity and documentation by status
 - Check status history anytime, resulting in fewer inquiries
 - Track workflow and time spent on specific tasks



Own your tomorrow.

The new Distributions Dashboard appears below.

Color-coded Status Tracker

Status	Count
REQUESTED	2
REJECTED	1
PROCESSED	28
ORDERED	0
RELEASED	26
INSTRUCTED	40
PAID	0

SEARCH DISTRIBUTIONS

Last Name	First Name	Last 4 SSN	Status	Status Description	Request Date	Distribution ID	Distribution Type	Requested Amount	Termination Date	Request Origin	Plan ID	Plan Name	Email Address
...	...	XXX-XX-2755	Processed	Processed	03/27/2018	55	LumpSum	\$580.00	06/17/2015	Recordk...	VS3	Sample Plan	...
...	...	XXX-XX-2755	Processed	Processed	03/27/2018	56	LumpSum	\$580.00	06/17/2015	Recordk...	VS3	Sample Plan	...
...	...	XXX-XX-2801	Released	Released	03/23/2018	29	LumpSum	\$30,040.31	01/10/2018	Recordk...	DOG	The Ace Ha...	...
...	...	XXX-XX-6911	Processed	Processed	04/09/2018	126	LumpSum	\$19,308.01		Recordk...	TG6	Plan Name
...	...	XXX-XX-6912	Rejected	Rejected	03/20/2018	16	LumpSum	\$29,698.62		Recordk...	TG2	Plan Name
...	...	XXX-XX-6913	Instructed	Instructed	03/27/2018	46	LumpSum	\$30,504.46	07/31/2014	Recordk...	PUP	Plan Name
...	...	XXX-XX-6915	Released	Released	03/26/2018	40	Forfeiture...	\$0.00		Recordk...	PUP	Plan Name
...	...	XXX-XX-6915	Instructed	Instructed	03/27/2018	47	LumpSum	\$49,310.96		Recordk...	PUP	Plan Name

26 - 50 of 97 items

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