

Schwab RT Plan Sponsor/Advisor Portal

Schwab Retirement Technologies® (Schwab RT) is delighted to announce the availability of its new web experience for plan sponsors and advisors. For recordkeepers and TPAs looking to grow their business, the new sites will provide stimulating new ways for advisors and sponsors to work together on behalf of plan participants.

The new sites provide users with the latest advances in responsive web design, featuring role-based dashboards with rich, intuitive graphical formats that can be viewed on desktops or tablets. When a sponsor or advisor signs on to the site, a different dashboard is presented, depending on the role assigned to that user. Each dashboard is designed to facilitate access to the information and tasks of interest to each role.

Integrated portal
with role-based
dashboards for
plan sponsors
and advisors.

Plan sponsor features and benefits

The plan sponsor site provides:

- Role-based dashboard with a list of pending tasks requiring the sponsor's attention, with seamless access to Payroll and Loan Dashboards
- Data grid listing of all investments in all plans available to the sponsor
- Access to detailed plan, participant, and investment data
- Ability to request reports on demand
- Custom skins and menus
- Custom branding

The screenshot displays the Plan Sponsor Dashboard for Generic Company. The top navigation bar includes 'MY PLAN(S)', 'REPORT CENTER', and 'PARTICIPANTS'. The main content area features a table of investments with columns for Investment Name, Ticker, CUSIP, Links, Price, Units, Market Value, and Plans with Balance. The table lists several investment funds such as AF EuroPacific Growth - R4, American EuroPacific R6, and Artisan Mid Cap Value. To the right of the table, there are 'Tasks' and 'Reports' sections. The 'Tasks' section lists 'Loans Near Payoff' (7), 'Payroll Funding Past Due' (20), and 'Payroll Data Past Due' (20). The 'Reports' section lists 'Unread' (2), 'Favorites' (0), and 'Important' (0). At the bottom of the dashboard, there are three main action buttons: 'Help A Participant', 'Payroll', and 'Loan Information'.

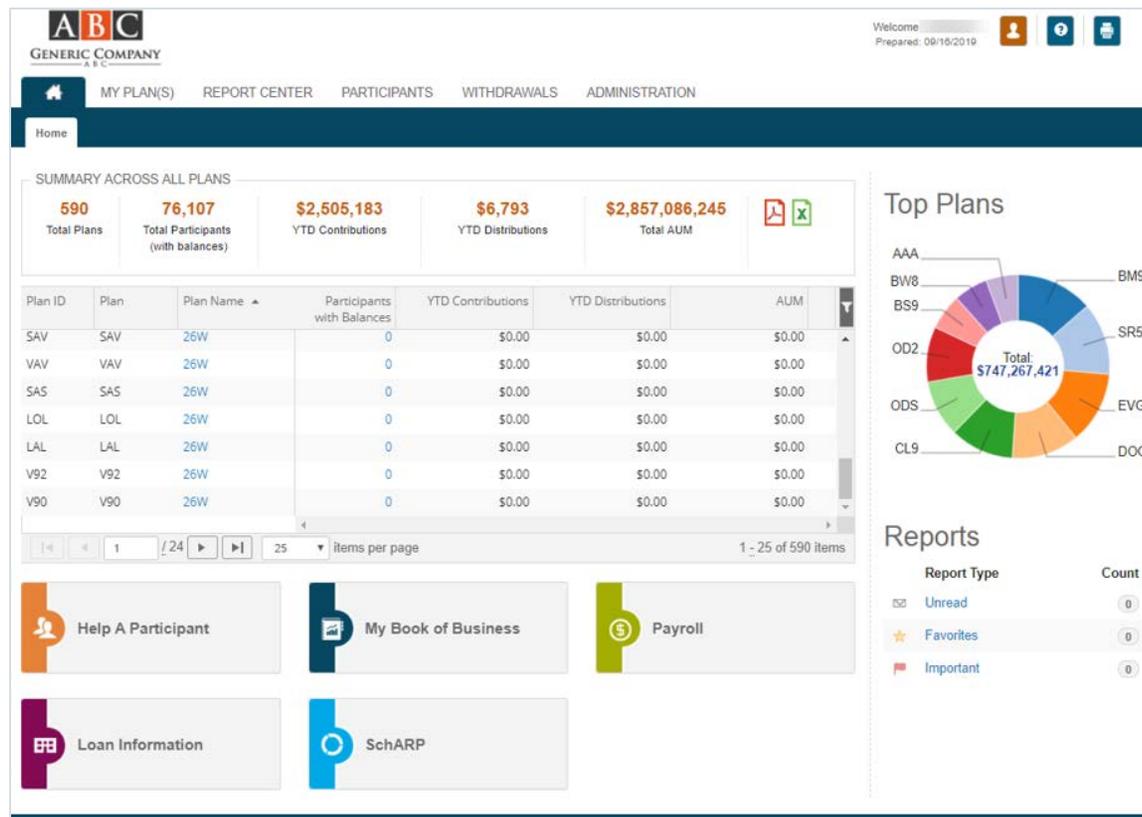
Investment Name	Ticker	CUSIP	Links	Price	Units	Market Value	Plans with Balance
AF EuroPacific Growth - R4	RREX	RREX	i d l	\$10.870	7,317.8930	\$78,081.92	1
American EuroPacific R6	RERG	RERG	i d l	\$43.744	54,588.0180	\$2,388,921.18	1
Artisan Mid Cap Value	ARTQ	ARTQ	i d l	\$23.245	13,085.7880	\$303,716.20	2
Aston/River Road Small Cap Val	ARSV	ARSV	i d l	\$15.155	58,118.0400	\$880,458.91	1
Baron Growth Fund	BGRFX	BGRFX	i d l	\$80.829	5,127.8550	\$311,924.45	1
Cohen & Steers Global Realty I	CSSPX	CSSPX	i d l	\$49.844	34,318.9710	\$1,703,815.92	1
Easton Vance Worldwide Health S	ETHSX	ETHSZ	i d l	\$10.232	19,174.6710	\$198,199.84	1
Forward Tactical Growth Inst	FTGW	FTGWX	i d l	\$28.787	178,992.2040	\$4,741,044.79	1

Plan sponsor dashboard. For illustration purposes only

Plan advisor features and benefits

The plan advisor site provides:

- Role-based dashboard with emphasis on YTD contributions, distributions, and assets under management across all plans in the advisor's book of business
- Seamless access to Payroll and Loan Dashboards
- Access to detailed plan and investment data
- Ability to request reports on demand
- Ability to access participant information in preparation for conversations with participants about their retirement outcomes
- Ability to configure data to support Relationship Managers who manage a group of plans within your recordkeeping firm or to access all your plans and participants as a principal of your firm
- Custom skins and menus
- Custom branding



Plan advisor dashboard. For illustration purposes only

Contact us

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