Schwab Retirement Technologies®

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.

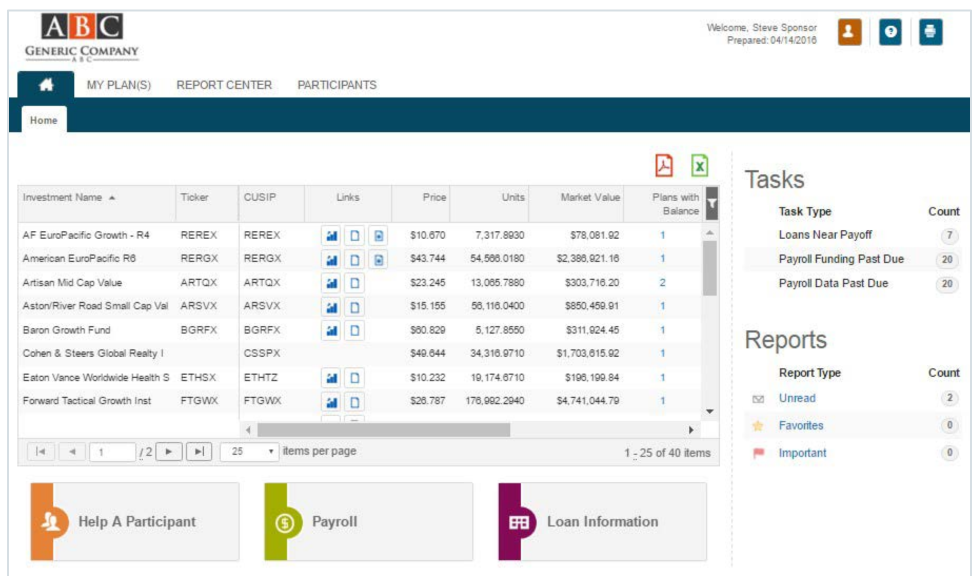
The new sites provide users with the latest advances in responsive web design, featuring role-based dashboards with rich, intuitive graphical formats that can be viewed on desktops or tablets. When a sponsor or advisor signs on to the site, a different dashboard is presented, depending on the role assigned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

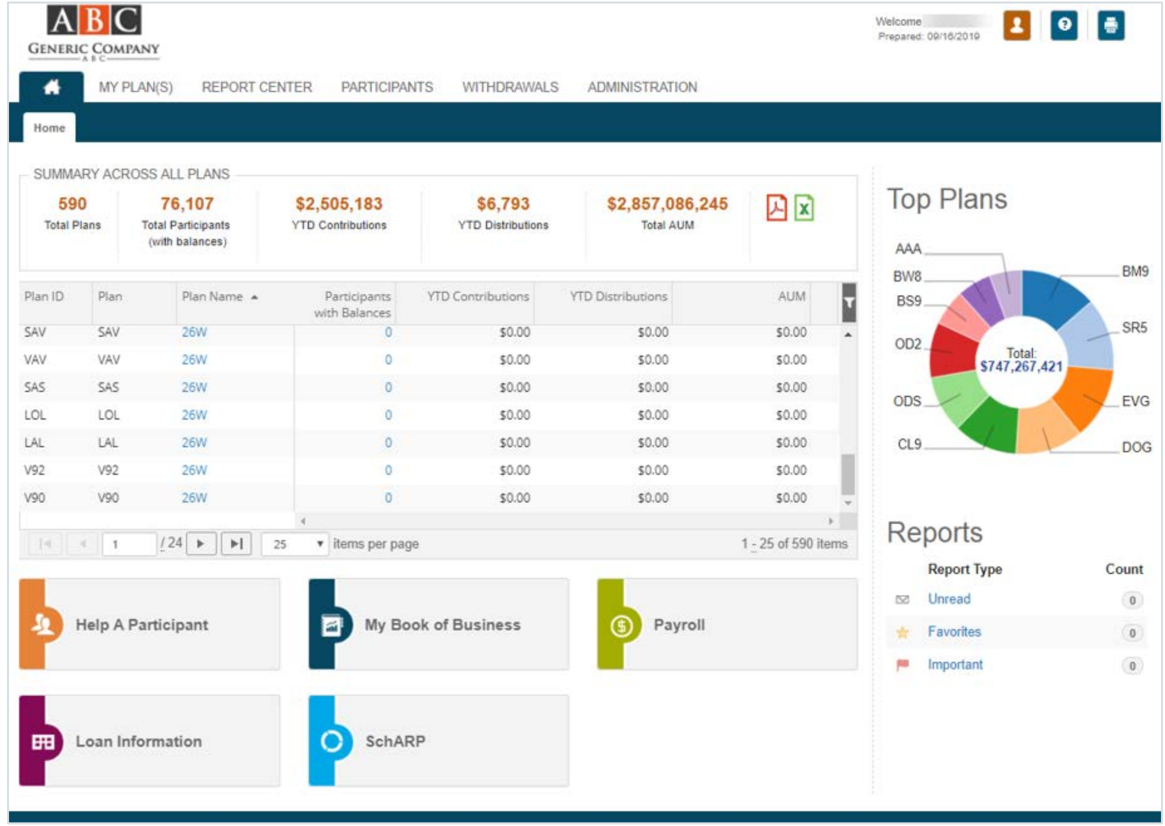


Plan sponsor dashboard. For illustration purposes only

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 Dash-boards
- Access to detailed plan and investment data
- Ability to request reports on demand
- Ability to access participant information in prep-aration 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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