

# New Responsive Web Experience for Plan Sponsors and Advisors

Schwab Retirement Technologies® (Schwab RT™) is delighted to announce the availability of its new web experience for plan sponsors and advisors.

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.

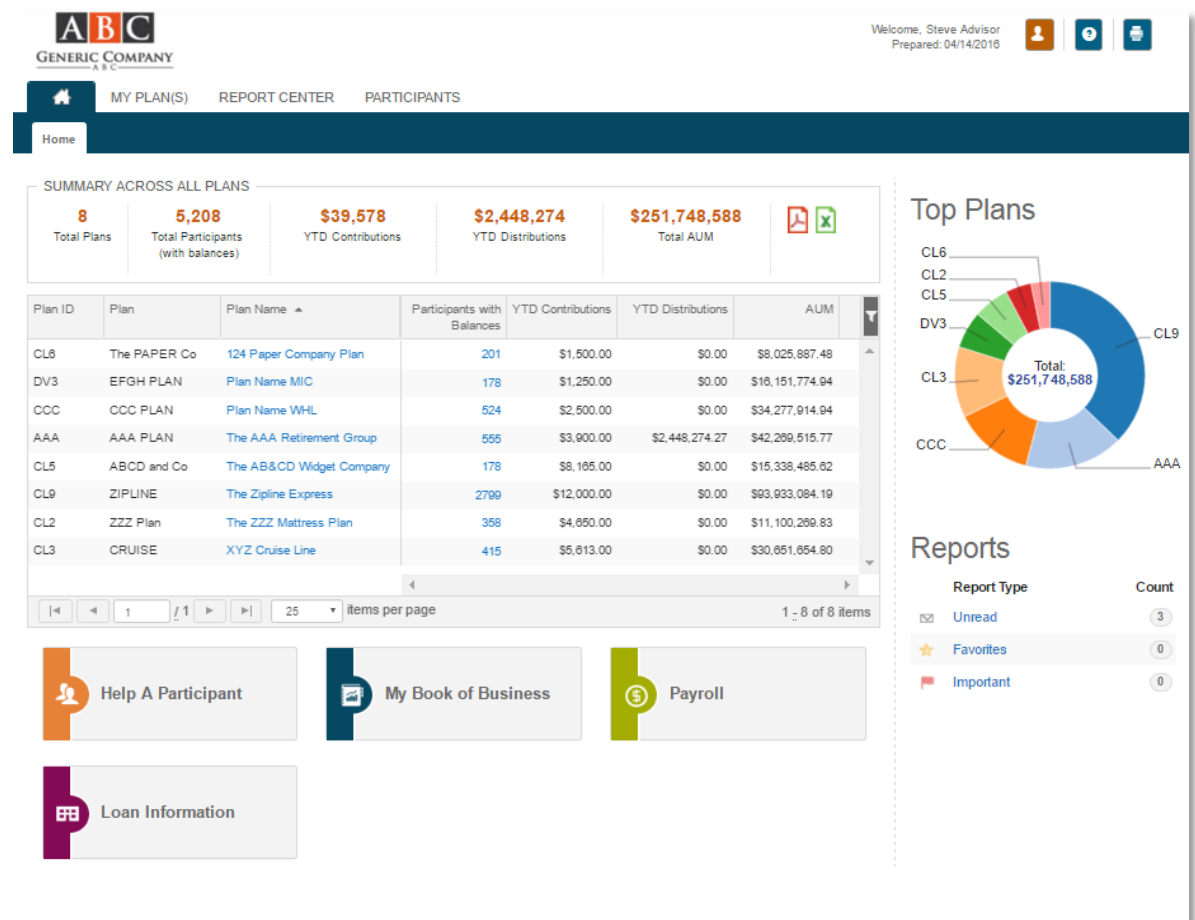
For recordkeepers and TPAs looking to grow their business, the new sites will provide stimulating new ways for advisors and sponsors to work together on behalf of plan participants.

**Role-Based Dashboards:** 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.

## 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

## 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

Generic Company ABC

Welcome, Steve Sponsor  
Prepared: 04/14/2016

MY PLAN(S) REPORT CENTER PARTICIPANTS

Home

Investment Name	Ticker	CUSIP	Links	Price	Units	Market Value	Plans with Balance
AF EuroPacific Growth - R4	REREX	REREX		\$10.670	7,317.8930	\$78,081.92	1
American EuroPacific R6	REGGX	RERGX		\$43.744	54,588.0180	\$2,386,921.16	1
Artisan Mid Cap Value	ARTQX	ARTQX		\$23.245	13,065.7880	\$303,716.20	2
Aston/River Road Small Cap Val	ARSVX	ARSVX		\$15.155	58,116.0400	\$850,459.91	1
Baron Growth Fund	BGRFX	BGRFX		\$60.829	5,127.8550	\$311,924.45	1
Cohen & Steers Global Realty I	CSSPX	CSSPX		\$49.644	34,316.9710	\$1,703,615.92	1
Eaton Vance Worldwide Health S	ETHSX	ETHSZ		\$10.232	19,174.6710	\$196,199.84	1
Forward Tactical Growth Inst	FTGWX	FTGWX		\$26.787	178,992.2940	\$4,741,044.79	1

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Help A Participant Payroll Loan Information

Tasks

Task Type	Count
Loans Near Payoff	7
Payroll Funding Past Due	20
Payroll Data Past Due	20

Reports

Report Type	Count
Unread	2
Favorites	0
Important	0

Plan Sponsor Dashboard. For illustration purposes only

## Contact Us

For more information, contact Ben Lee at [benjamin.lee@schwab.com](mailto:benjamin.lee@schwab.com).

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