

# Participant Mobile App

Schwab  
Retirement  
Technologies®

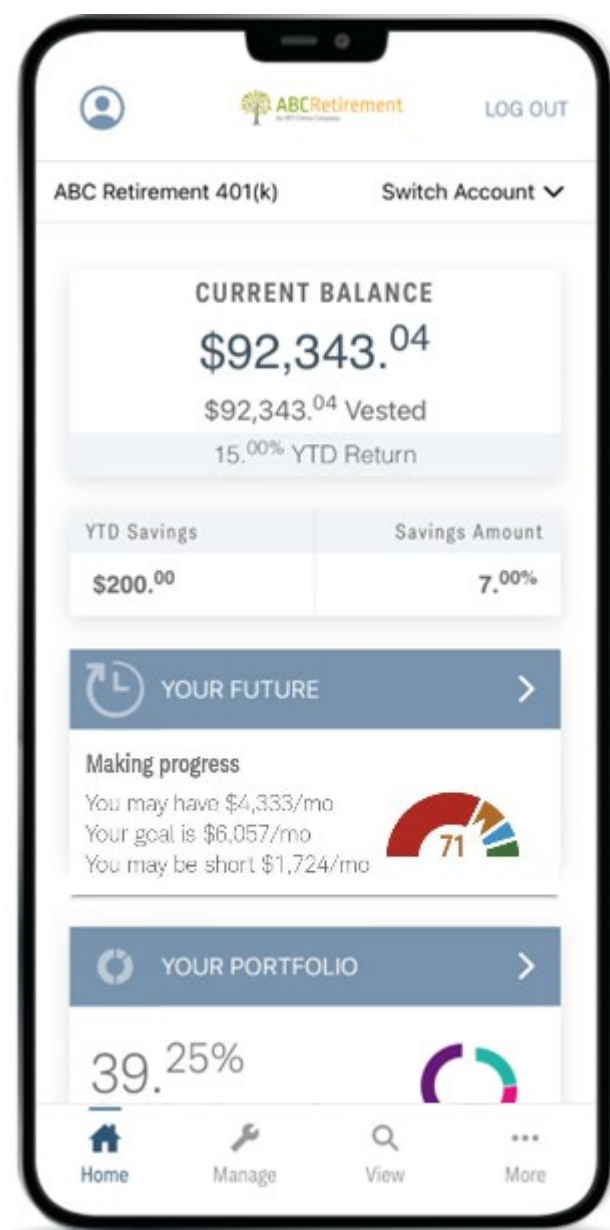
Engage your plan participants with the new mobile app from Schwab Retirement Technologies® (Schwab RT), available on iOS and Android™. Our app provides a modern mobile experience that is designed to help you reach participants on the devices they use most – and enable participants to keep their retirement or health savings accounts within reach wherever they go.

## Participant features and benefits

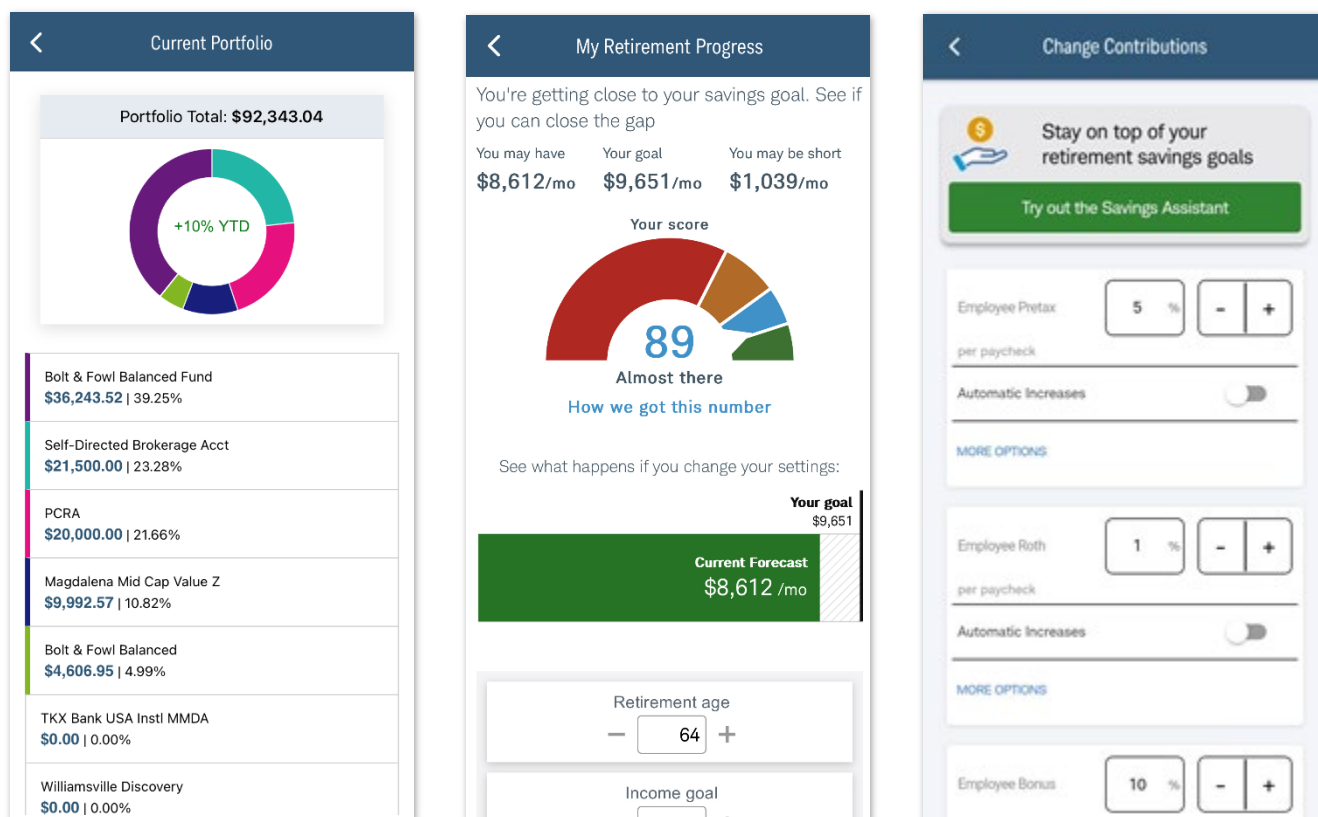
- Account dashboard showing balances, portfolio performance, savings rate, and other key details
- Retirement progress score, income projection, interactive calculator, and peer comparison
- Educational videos about saving and investing principles
- Secure document upload, with mobile camera integration
- Contribution rate changes
- Investment election updates
- Plan investment performance, with fund fact sheets and prospectuses
- Profile management, including ability to add or update beneficiaries
- Spanish language support
- Biometrics and two-factor authentication for convenient, secure login

## Administrator features and benefits

- Custom apps created for each recordkeeper in the App Store® and Google Play™ store
- Plan-specific branding
- Plan-specific apps (*for additional fee*)
- Custom menu items
- Custom welcome message
- Self-registration and credential creation
- Account setup feature (forces participants to update missing or outdated security information)



For illustrative purposes only. Subject to change.



Portfolio summary, retirement income projection, and contribution rate change.  
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## Additional features coming soon

- Investment rebalancing
- Participant activity history

## Contact us

For more information or to request a demo, contact Schwab RT at [schwabrt@schwab.com](mailto:schwabrt@schwab.com).

Requires a wireless signal or mobile connection. Access to Electronic Services may be limited or unavailable during periods of peak demand, market volatility, systems upgrade, maintenance, or for other reasons. Functionality may vary by operating system and/or device. Mobile carrier data charges may apply.

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