

Participant Mobile App

Schwab
Retirement
Technologies®

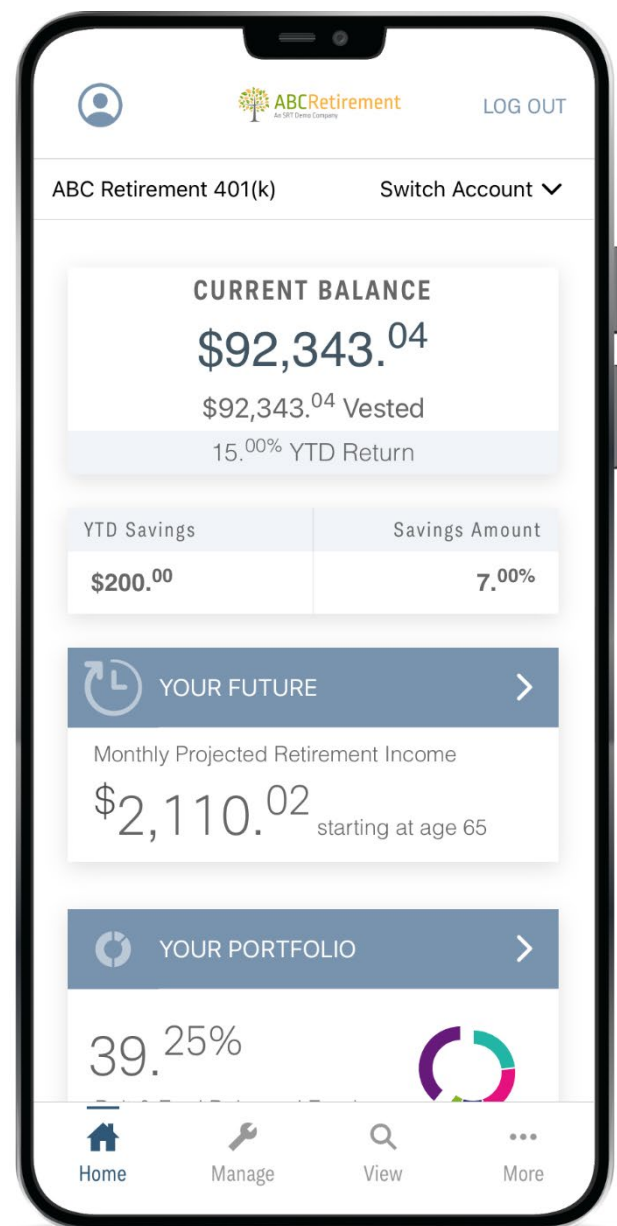
Engage your plan participants with the new mobile benefits app from Schwab Retirement Technologies® (Schwab RT). Our new app, available for iOS and Android™, provides a modern mobile experience that is designed to help you reach participants on the devices they use most – and enable participants to keep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

Participant features and benefits

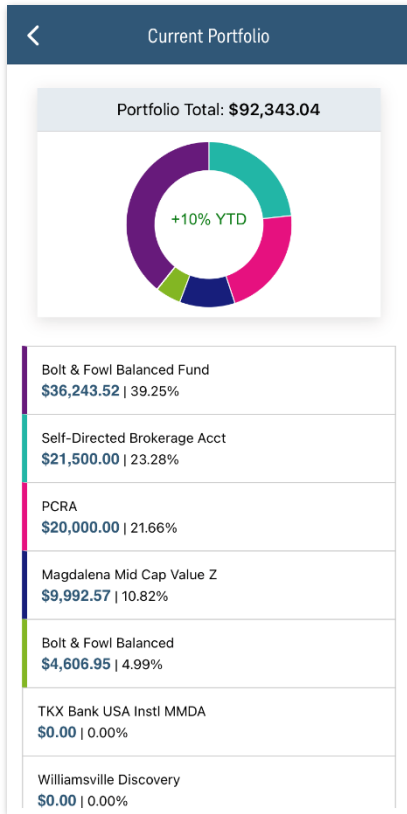
- Account dashboard showing balances, portfolio performance, savings rate, and other information at a glance
- Retirement income forecast and call to action
- Educational videos about saving and investing principles
- Secure document upload, with mobile camera integration
- Investment election updates
- 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
- Custom menu items
- Custom welcome message
- Account Setup feature (forces participants to update missing or outdated security information)



For illustrative purposes only. Subject to change.



Secure File Upload

Transaction Type: **Loan**

Attach Files

file.jpeg 100%

Add up to 5 files, no more than 10 MB total

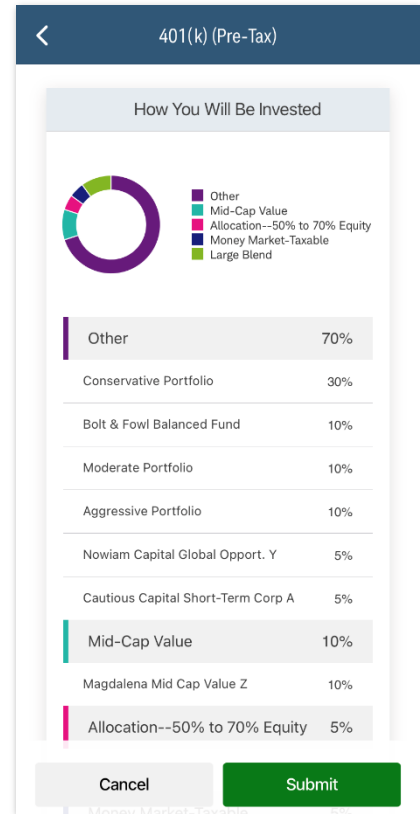
Comments Optional

My completed loan application is attached.
Please let me know if you need anything else.

912 characters remaining

Is it safe to send confidential documents

Reset Upload



Portfolio summary, secure file upload, and investment elections transaction.
For illustrative purposes only. Subject to change.

Additional features coming soon

- Self-registration and plan enrollment for new participants
- Push notifications
- Transaction history
- Investment transfers and realignments
- Contribution rate updates
- My Retirement Progress, an income projection tool developed by Schwab RT

Contact us

For more information or to request a demo, contact Schwab RT at schwabrt@schwab.com.

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Retirement income projection is provided by Integrated Retirement Income Optimizer (IRIO), a product of vWise, Inc. vWise is not affiliated with the Charles Schwab Corporation. Schwab RT does not supervise third party firms and takes no responsibility to monitor the services they provide.

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