

Schwab Advisor Portfolio Connect™

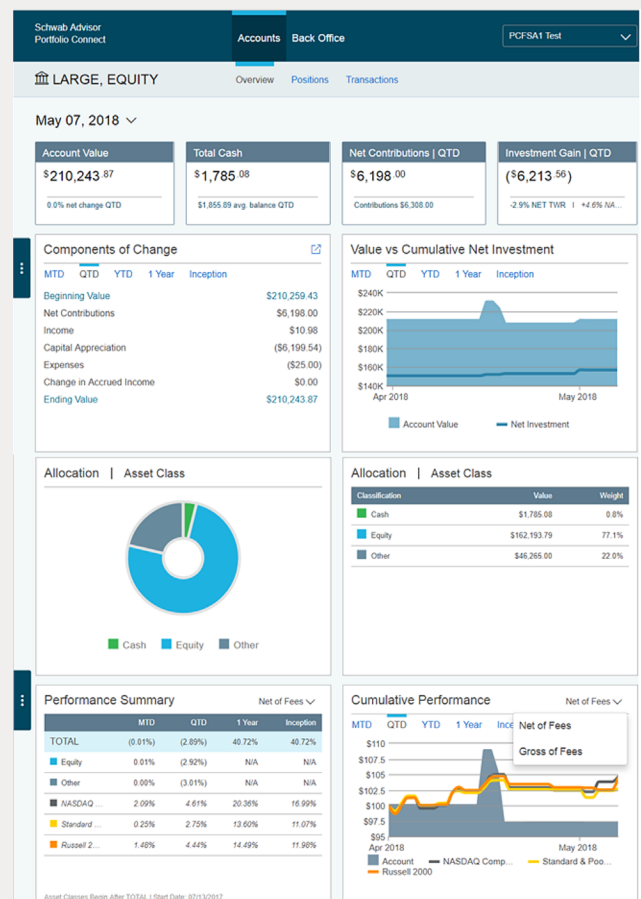
A SIMPLIFIED APPROACH TO PORTFOLIO MANAGEMENT

Schwab Advisor Portfolio Connect delivers key portfolio management features, including billing and reporting. Available free of charge to advisors whose clients custody with Schwab, this solution offers a new cost-effective option for managing Schwab accounts.

Key features include:

- Integration into Schwab Advisor Center®
- Daily account performance for Schwab accounts without the need for data reconciliation.
- An interactive client insight dashboard with account and portfolio views, including time-weighted returns with basic benchmarking and security classification.
- Account- and portfolio-level billing with simple fee options.
- Standardized client performance reports for accounts and households.

Note: This solution is only for Schwab accounts, and therefore is not a suitable replacement for the multi-custodial capabilities of PortfolioCenter™



For institutional audiences only.

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