

PORTFOLIOCENTER® IMPLEMENTATION COORDINATOR

GET PERSONALIZED GUIDANCE ON YOUR FIRM'S SETUP

PortfolioCenter is a powerful portfolio management and performance reporting system that can be customized to meet your firm's needs and operations. Working one-on-one with a dedicated Implementation Coordinator can help you get PortfolioCenter up and running efficiently, which will allow you to start seeing benefits right away.

The Implementation Coordinator works closely with you to help plan for your firm's needs during the setup process so you get the most out of PortfolioCenter. He or she will make sure you are fully leveraging the most appropriate features available and will help you schedule your activities to maximize efficiency. Whether you are new to a portfolio management system or are converting from another solution, you will find the guidance and expertise instrumental in making your transition as seamless as possible.

SERVICES OFFERED

The services provided by the Implementation Coordinator are offered only as part of the [PortfolioCenter Implementation Service Bundles](#). The coordinator plays an important role in keeping the transition process running smoothly for you. He or she can conduct product training and will make sure you are using the best resources available for learning how to use PortfolioCenter features. The coordinator will also let you know early in the implementation process about key considerations that may impact the way your system is setup and used—helping to minimize the need to make changes to your settings later if they do not fit your firm's operations.

As part of your bundle package, your Implementation Coordinator will provide:

- An initial consultation to learn about your business, your goals, and your staff's needs with PortfolioCenter
- Assistance to create an action plan during the implementation period and beyond to ensure success for your firm's goals for PortfolioCenter.
- Custodian interface setup for brokerage data feeds and training on daily interface processing
- Eight remote one-hour custom trainings with your firm to discuss the setup progress, provide remote training, and/or answer any questions you have
- Remote access to work with your data directly during implementation calls
- Ability to include multiple employees in weekly calls for training purposes
- Recommended best practice documents and training videos that review how to handle processes specific to your firm
- A dedicated representative that can provide guidance and internal support on any issues that need to be addressed, whether through our operations, sales, or technical support teams

In combination with our vast library of product documentation, training and consulting services, and the experience of an industry-leading technical support team, we create a partnership that will give you the right foundation for success with PortfolioCenter.

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