



PortfolioCenter Hosted™ Simplify. Scale. Grow.

You work hard to please clients and deliver results. To do both successfully, your primary focus needs to be on your clients, not your technology infrastructure. That's why Schwab Performance Technologies® (SPT) built PortfolioCenter Hosted to work in sync with the way you run your business. With the dynamic capabilities of PortfolioCenter Hosted, you can streamline your technology operations to save valuable time that could be better spent on nurturing client relationships and growing your business.

Our convenient, cloud-based platform gives you exceptional portfolio management and reporting capabilities in a secure, online solution hosted by SPT—helping you reduce your firm's hardware footprint while maintaining control over your data. In addition, you can reduce IT administration and the costs associated with running technology in-house.

With a hosted solution, you can:

- **Reduce IT overhead**—Save time and resources otherwise spent on maintaining your in-house portfolio management and technology infrastructure.
- **Gain secure, flexible access to client information**—Take client service to new heights with the convenience of an integrated cloud-based solution.
- **Customize everyday tasks**—Elevate your firm's brand while meeting specific client and business needs with customizable functions for reporting, accounting, billing, and more.
- **Scale in step with your business**—Meet the demands of a growing business with a solution that scales reliably, letting you build your firm without technology limitations.

Deliver Better Client Service

Customizable Client Reports and Billing

Clearly show clients how you're managing their investments with reports that reflect exactly what you want to share with them and how you want to share it. PortfolioCenter Hosted™ offers customizable graphical reports—including performance, holdings, and billing—that help highlight your firm's brand identity, underscore the value you offer clients, and allow you to deliver crucial information in a compelling way.



Intelligent Integration

PortfolioCenter Hosted integrates seamlessly with Schwab OpenView Gateway™ to provide multicustodial data to the systems you use every day—including your CRM—giving you a holistic view of client information in a single, centralized location.

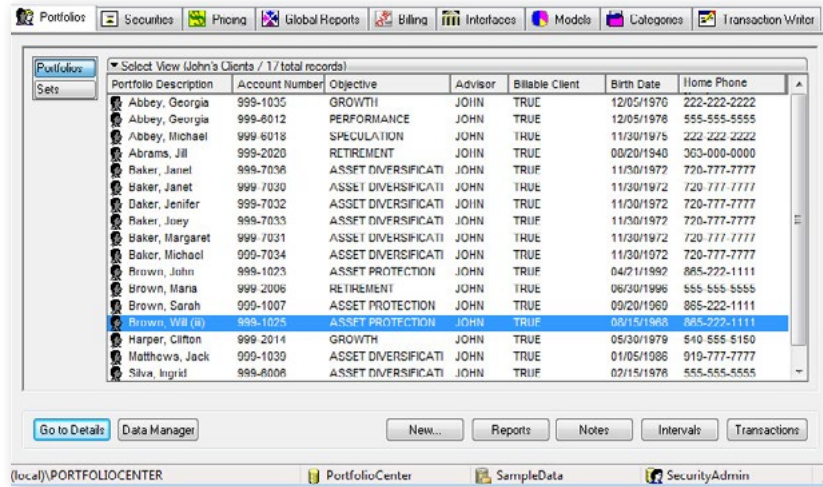
You can also integrate multicustodial data into spreadsheets and third-party applications—including trade order management, rebalancing, client relationship management, and financial planning solutions. This allows you to easily organize, manage, and use your data more effectively.

Customizable, professional-looking reports help you communicate with your clients.

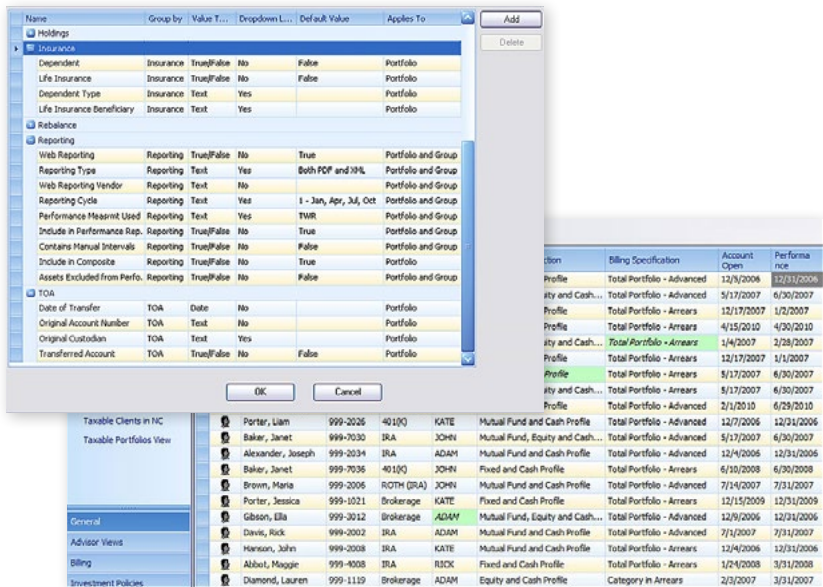


Individual names, account numbers, and contact information listed are fictional and not intended to reflect any existing individuals. Screenshots are provided for illustrative purposes only and have been abridged.

Manage and Protect Your Data



Easily access, organize, and manage your data.



PortfolioCenter Hosted is intuitive and easy to use.

Data Management and Decision Support Tools

With accurate, organized data at your fingertips, you can make quicker, more informed business decisions. Our user-friendly data management tools help streamline data entry, and our advanced performance measurement tools allow you to review critical performance data and compute advanced analytics.

Rigorous and Reliable Data Security

Your security is our top priority. With PortfolioCenter Hosted™, your data resides in an enterprise-class center, protected by highly redundant systems to guard against system failure and backed by rigorous disaster recovery plans. In addition, the Security Rights & Roles module gives you greater control and customization over user access. This enables your firm to limit the portfolios a user can see, regulate the actions a user can perform, and audit user activity in accordance with your firm's security policy.

A Tradition of Excellence

There's a reason why more than 3,600 advisory firms nationwide rely on our proven technology, deep expertise, and dedicated service to help power their businesses. For nearly 30 years, SPT has developed and delivered innovative technology solutions, inspired by working closely with—and listening to—financial advisors and investment managers.

As a subsidiary of The Charles Schwab Corporation, we are part of one of the most trusted companies in the industry. And we fulfill that trust by tapping into expertise, insight, and resources from across Schwab to deliver best-in-class service, day in and day out.



Contact us today to learn more about PortfolioCenter Hosted™

For more information, visit schwabpt.com or call us at **1-800-528-9595**.

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