

# Schwab RT Participant Web

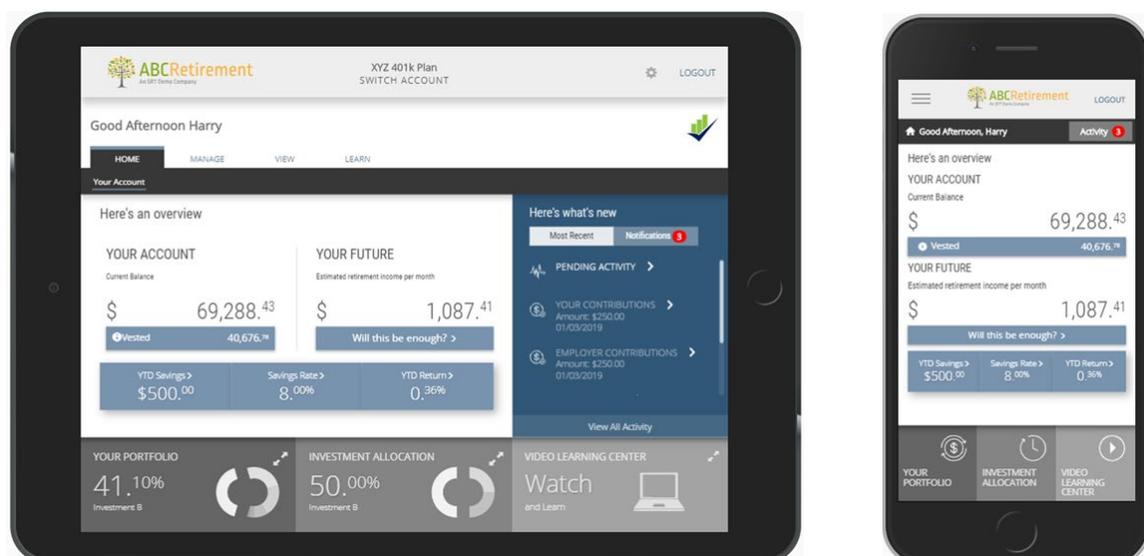
Schwab  
Retirement  
Technologies®

The newly redesigned participant website from Schwab Retirement Technologies® (Schwab RT) has a clean and responsive layout that helps participants clearly see their personal retirement journey. It provides what our clients' plan participants have been asking for: a simpler experience that makes it easy to find the information they need.

A clear and simple account portal for plan participants.

## Participant features and benefits

- Simple and clear design, with key information such as account balances and projected income front and center
- Simple charts that seek to make portfolios more understandable, with deeper levels of detail just a click away
- Responsive design that allows participants to view and manage their accounts from any device, including tablets and smartphones
- Secure document upload
- Retirement help videos
- Integration with Quicken to support account aggregation
- Morningstar market and performance data, prospectuses, and fund fact sheets
- Two-factor authentication via email or text message for enhanced security

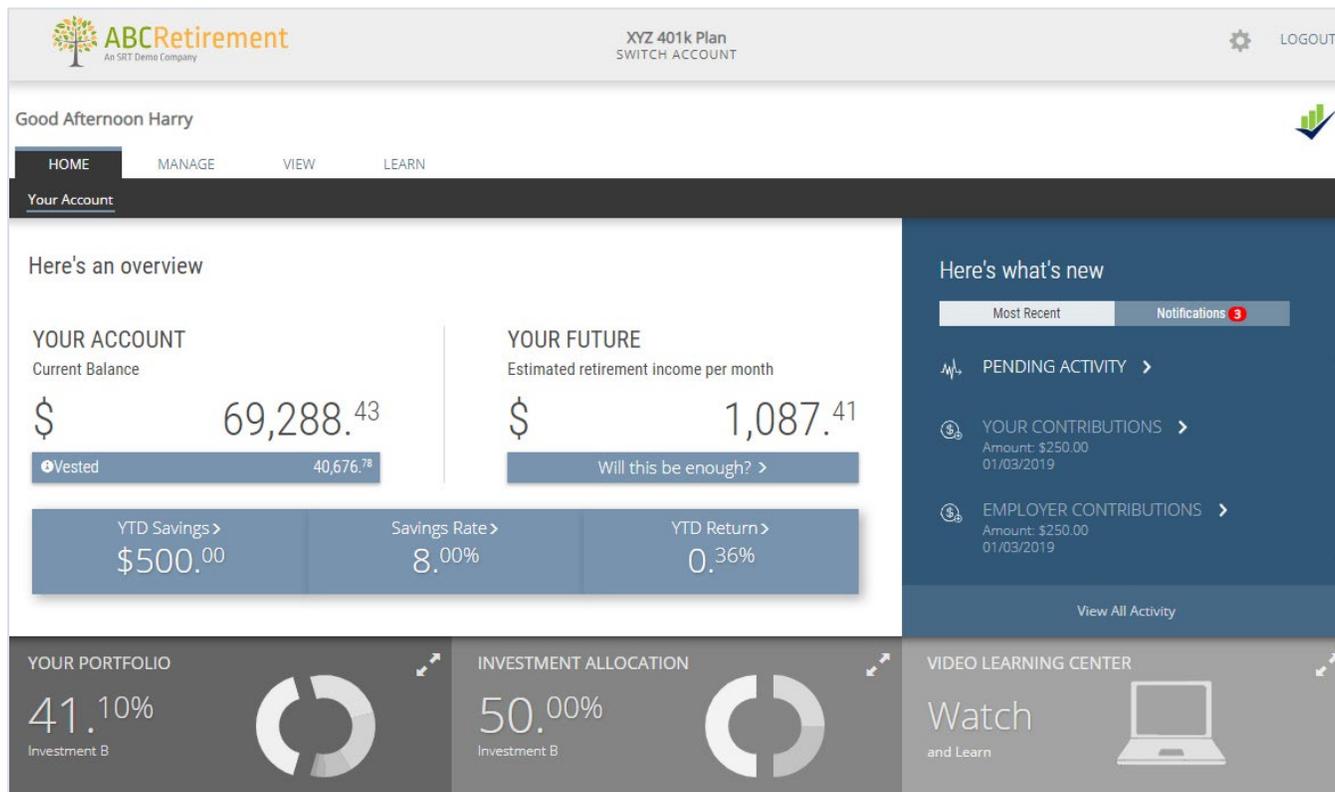


Participant Dashboard viewed on a tablet and mobile phone. For illustration purposes only

## Administrator features and benefits

The new participant site provides:

- Pre-built home page options with deep-linking navigation features designed to help drive participant engagement
- Custom skins, menus, and branding
- For Health Savings Account (HSA) providers and administrators: integration to enable HSA savers and investors to open a new self-directed Health Savings Brokerage Account (HSBA) at Charles Schwab



Participant Dashboard viewed on a desktop or laptop screen. For illustration purposes only

## Contact us

For more information, contact Ben Lee at [benjamin.lee@schwab.com](mailto:benjamin.lee@schwab.com).



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