

SchARP Workflow Automation

Schwab
Retirement
Technologies®

Automate your recordkeeping operations with Schwab Automated Retirement Processing (SchARP), a flexible tool for workflow management.



Features and benefits

- Core feature – no additional licensing required
- Design, schedule, and monitor repetitive tasks
- Build unlimited workflows of tasks that run in sequence
- Run workflows automatically based on a schedule or trigger
- Each workflow can be easily configured by the TPA's day-to-day recordkeeping operations team to suit their individual business needs

Capabilities

Workflow automation

- Annual deferral increase program
- Automatic contribution arrangements
- Compliance testing and refunds
- Eligibility determination and welcome letters
- Fee processing
- Hardship withdrawals
- Investment dividends and accruals
- Investment swaps
- Loan processing and repayments
- Participant statements and fee disclosures
- Participant status changes
- Portfolio rebalancing
- Scheduled reports for sponsors and advisors
- Termination distributions

Payroll integration

- 180° and 360° integrations with payroll providers
- Payroll file upload for plan sponsors
- Census and financial data validation
- Compensation and hours tracking
- Payroll trade automation (cash matching)
- Funding requests and notices of deposit

Trade automation

- Trade file downloads
- Trade export and import
- Trade settlement and release
- Investment market value (pricing) calculation
- Disbursement directives
- Rule 22c-2 response files
- Loan principal updates
- Excessive trading constraints
- Unit and cash reconciliation
- Money market fund transactions

Contact us

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

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