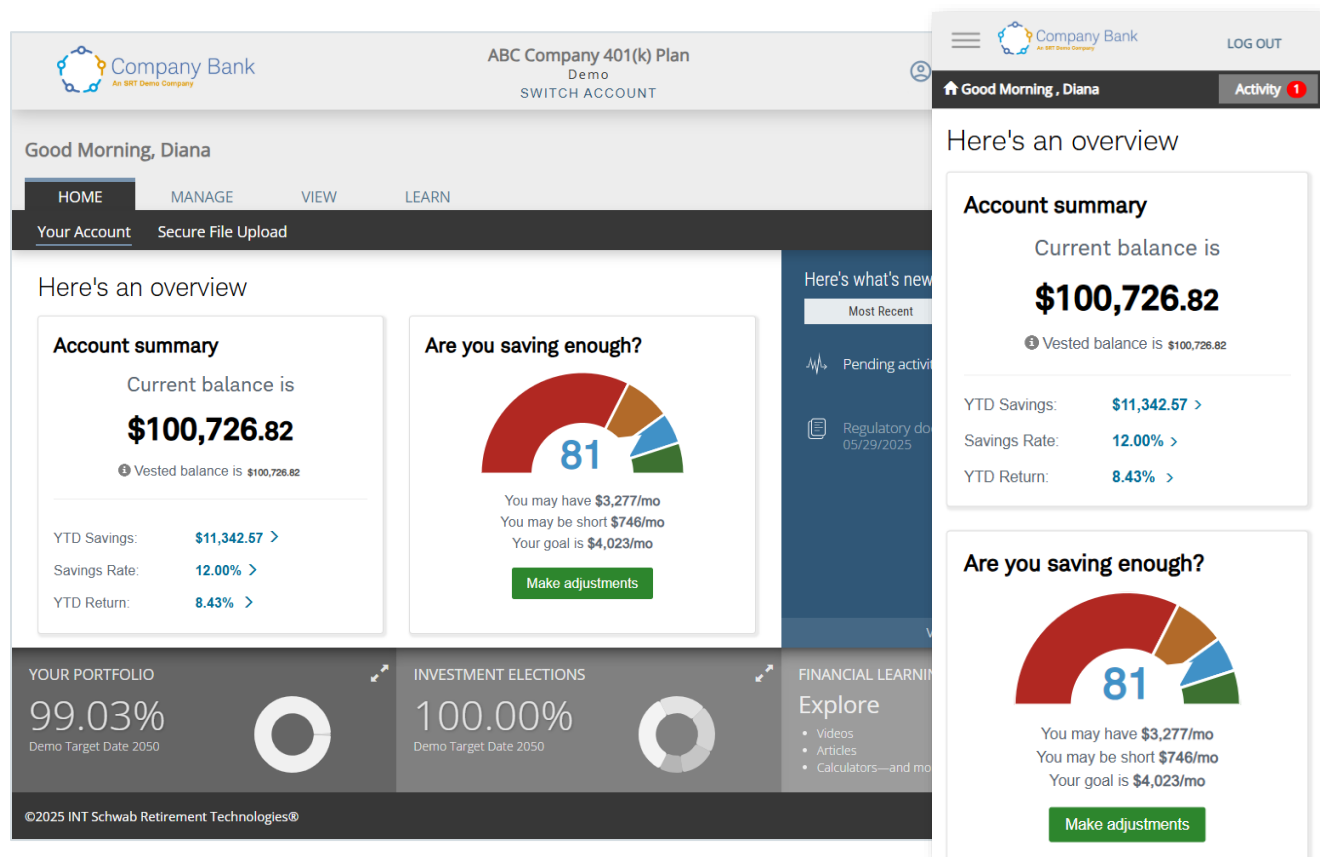


Participant Website

Schwab
Retirement
Technologies®

Provide your plan participants with an engaging, easy-to-use web experience for their retirement account. Our participant website is designed to give participants the tools and information they need while encouraging them to save and grow their financial future.



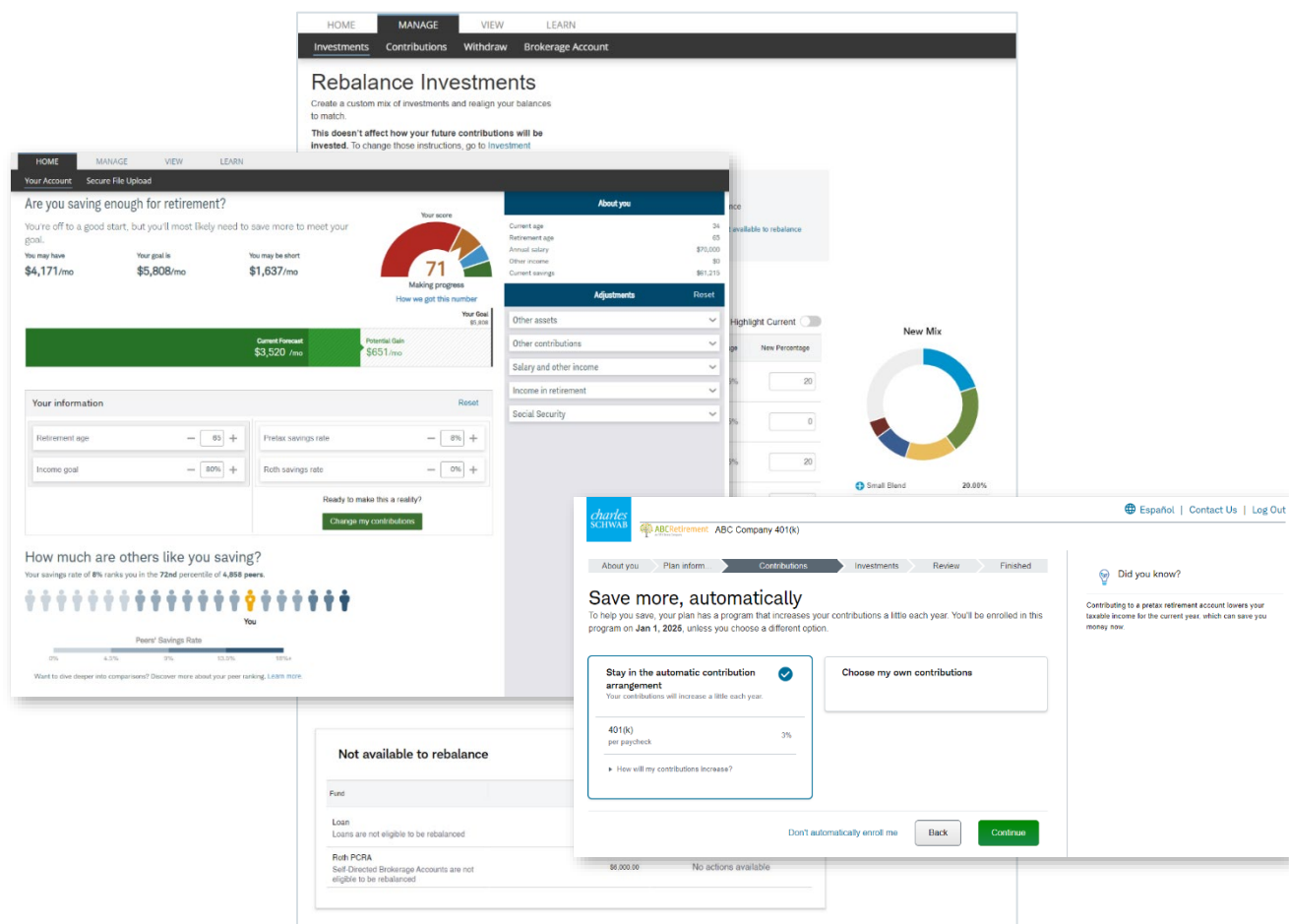
Participant dashboard on desktop and mobile devices. For illustrative purposes only.

Features for participants

- Simple and clear account dashboard, with balances and projected income front and center
- Easy enrollment process to help new participants set up their contributions and investments
- Retirement progress score, income projection, interactive calculator, and peer comparison
- Secure document upload
- Financial learning center with videos, articles, calculators, and more
- Comprehensive tools for managing contributions, investments, and account information
- Integrations with popular account aggregators
- Two-factor authentication via email or text
- Spanish-language version of the site

Features for administrators

- Custom skins, menus, and branding
- Integration for participants to open a self-directed Personal Choice Retirement Account® at Charles Schwab
- Paperless features for account statements, 1099 tax forms, and plan documents
- Morningstar market and performance data, prospectuses, and fund fact sheets



Retirement calculator, rebalancing, and enrollment experiences. For illustrative purposes only.

Next steps

For more information, contact Schwab RT at schwabrt@schwab.com.



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