

Plan Health

Schwab
Retirement
Technologies®

Plan Health, powered by dailyVest, empowers plan sponsors and advisors with dashboards, custom reports, and participant insights to monitor plan performance, identify trends, and uncover improvement opportunities. Available in our Plan Sponsor/Advisor portal at no extra charge to Schwab RT ASP clients.

Key benefits

Track plan performance with comprehensive dashboards

Unlock deeper plan understanding with advanced analytics

Spot improvement opportunities with actionable data

Analyze multiple plans together with aggregated reporting

Create custom reports for you and your clients

Find answers fast using intuitive filters and targeted analysis

Explore participant details through a census grid

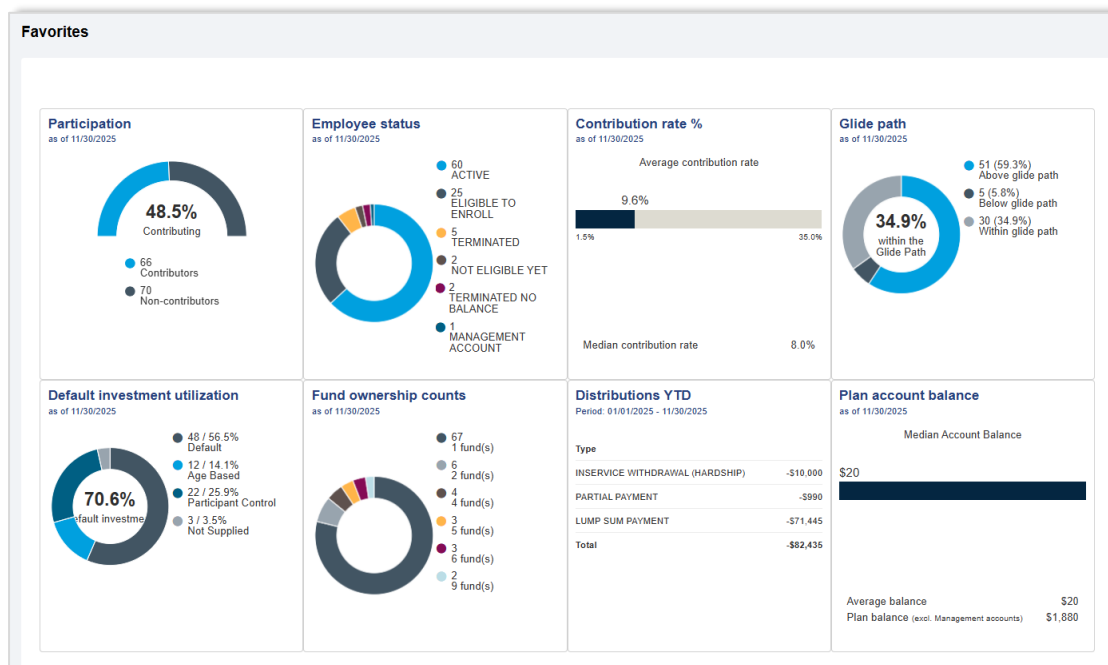
Share meaningful results with reports in various formats

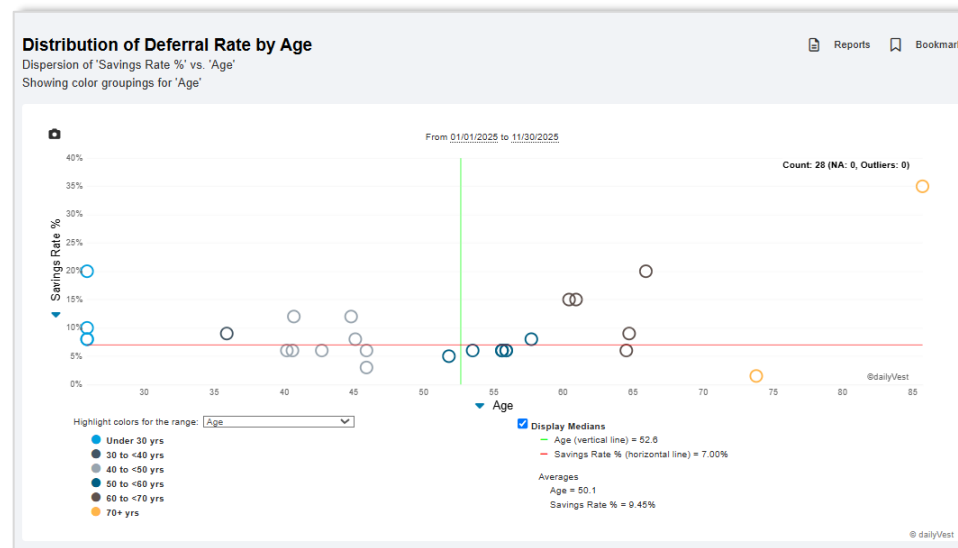
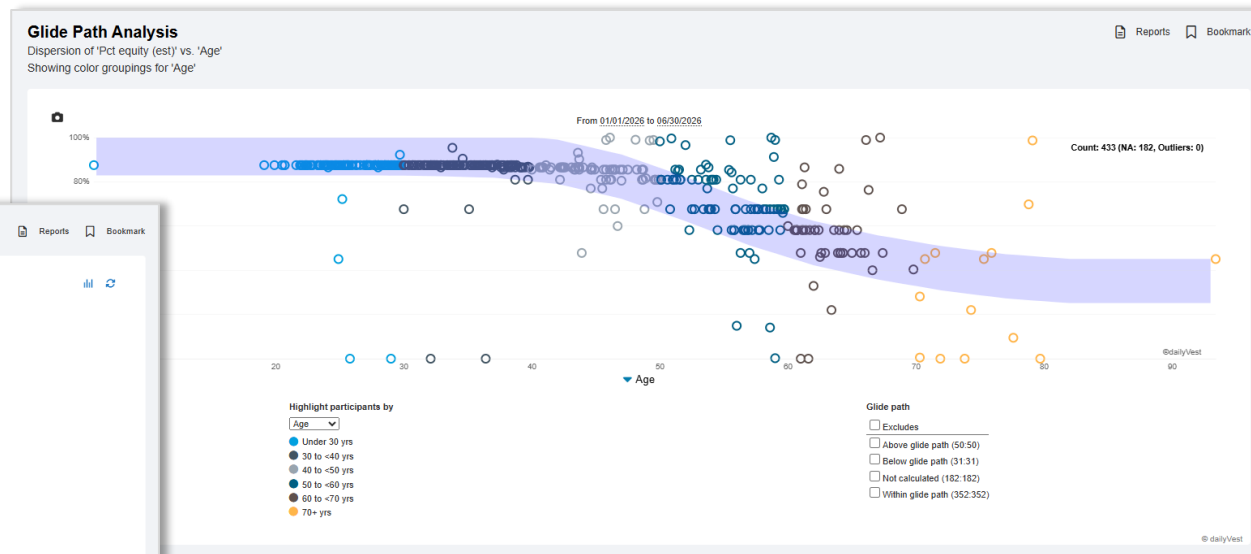
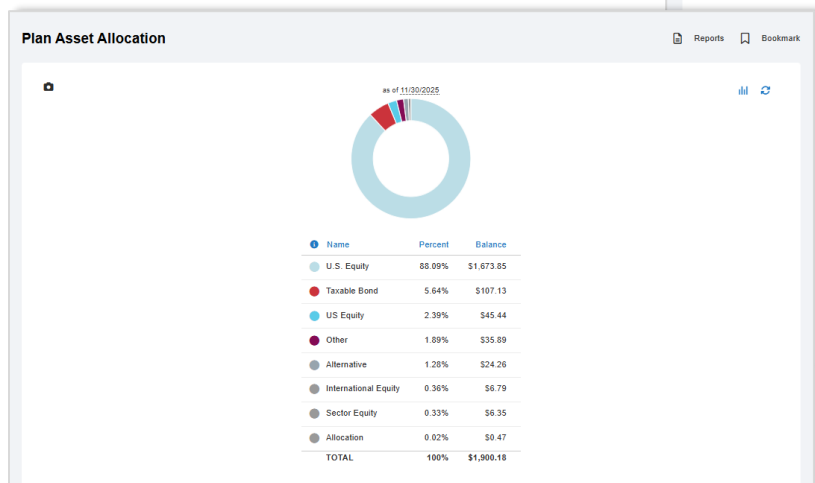
Visualize data your way with customizable charts

Stay organized with favorites and bookmarks

**Watch a quick video
to see Plan Health in
action.**

Scan the QR code or visit
schwabrt.com/planhealth.





Plan Health Favorites, Glide Path Analysis, Plan Asset Allocation, Distribution of Deferral Rate by Age experiences. For illustrative purposes only. Subject to change.

Next steps

Plan Health is easy to access from the Plan Sponsor/Advisor portal. Launch it from the “more” menu in your plan list or choose **Select for Plan Health** to aggregate plans.

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



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