Schwab Retirement Technologies®

Schwab Retirement Technologies® (Schwab RT) develops and licenses fully integrated retirement plan recordkeeping solutions to companies responsible for day-to-day plan administration.

Our clients include Third Party Administrators (TPAs), consulting firms, banks, trust companies, mutual fund companies, and insurance companies. Schwab RT has a history of introducing one innovation after another, from recordkeeping systems designed specifically for 'true' daily valuation processing to a highly modularized architecture and technology outsourcing solution. Schwab RT has the flexibility to handle a variety of plan types.

Benefits

Schwab RT offers sophisticated recordkeeping solutions for participant retirement plan accounts that:

- Improve efficiencies of internal administration.
- Provide the flexibility, scalability and performance for a growing business.
- Allow TPAs to present plan sponsors and participants with the training and education necessary to make more informed investment decisions.
- Offer customization to meet the distinct needs of each client.
- Provide clients with superior service: Application, Client Administration, Consulting and Implementation.

Features

Sophisticated Recordkeeping Software

Schwab RT's state-of-the-art system provides plan administrators with seamless administrative operations and reliable tracking of account data, including daily portfolio valuation and payroll automation. More than 4 million participants are serviced by the Schwab RT recordkeeping system.

Advanced Product Suite

Schwab RT offers an advanced suite of retirement technology products including SQL Recordkeeping, Web, Call Center and Voice. For those requiring a technology outsourcing solution, Schwab RT Application Service Provider (ASP) is available.

Schwab Automated Retirement Processing™ (SchARP)

SchARP automates and improves end-to-end recordkeeping and trust processes across multiple trading platforms and retirement software. With SchARP, you can achieve automated processing of manual and repetitive tasks within TPA operations, customized to your business.

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Client Services

Schwab RT helps clients navigate through an increasingly complex, competitive and dynamic marketplace. Our experienced staff provides guidance on products and services to help retirement plan administrators grow their business. We offer the following client services: Support, Consulting Services and Training and Education.

Support	Consulting	Training and Education
The support team has extensive experience in: • Employee Benefits • Recordkeeping • Technical/Network Administration • Operation Systems Many on staff have professional designations from: • American Society of Pension Professionals and Actuaries (ASPPA) • American Bankers Association (ABA) • Microsoft	Schwab RT consultants offer three distinct services: • Technical: Analyze the operating systems environment and develop automation tools to help improve productivity and efficiency. • Applications: Assist with conversion and programming for client reports and statements. • Practice: Evaluate existing processes, assist with writing procedures, and provide a one-day interactive seminar on daily-valued participant accounting.	Seasoned experts offer quality training programs to enhance productivity and efficiency. For example, • Interactive virtual classes using state-of-the-art Webcast technology. • Instructor-led classes at the training center in Charlotte, North Carolina. • Custom training solutions to meet district needs. Programs can range from a one-hour discussion to a four-day workshop.

Contact Us

SchwabRT@schwab.com

IAN (0406-5507) SLS30430-02 (04/07)

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