

BACKING THE INDEPENDENT®

charles SCHWAB
INSTITUTIONAL

Helping Advisors For Over 20 Years

FOR OVER 20 YEARS, Schwab Institutional has been at the forefront of helping advisors serve their clients, run their businesses more efficiently and plan for growth. That's a major reason why more independent registered investment advisors work with Schwab than any other custodian.

At Schwab Institutional, we provide much more than asset custody and trading services. We respect that your firm is unique. Leveraging deep industry insight allows us to tailor our services and support to meet the specific needs of your business. It's our personal commitment we make to help you succeed.

We Help You Run a Successful Business, Today and in the Future

• **Servicing your clients**—To us, custodial services are not a commodity. They are the foundation of our relationship and a vital link between you and your clients' information and assets. We've been committed to continually improving our technology and products for the past 20 years—longer than most custodians have been in this business. And we support you with some of the most experienced service teams in the industry.

• **Helping you run your business**— We work to offer services and information that help you to run your business more efficiently, so you can focus on

at the individual level. That's why everyone at Schwab Institutional is responsible for giving you what you need to succeed. Our staff of more than

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your first priority—your clients. With flexible technology, access to compliance resources and experienced consultants, we can help you save time and make your office more productive.

1,800 people is dedicated to understanding you and your business, then providing the support you need, when you need it.

• **Supporting your firm's growth**— We can help you lay a foundation for growth and build a tailored strategy that supports your specific growth objectives. You'll have access to tools, resources and information, including benchmarking and best practices, which can help you make more informed decisions and get the most out of your investments in marketing and business development.

That includes our service teams, account managers and senior management, as well as subject matter experts in multiple areas, from investment products and technology to practice management. Through daily interactions or at one of our many events, we make ourselves accessible to you. That way, we can discuss the challenges you face and how to serve you more effectively in the future.

Personally Accountable for Your Success

We recognize that success is built

We invite you to put Schwab Institutional to the test and see what our personal commitment can mean for your firm.

Schwab Institutional is a division of Charles Schwab & Co., Inc. Member SIPC. (0809-9309)

CONTACT: Schwab Institutional
211 Main Street, San Francisco, Calif. 94105 | 877.576.5412 | www.backingtheindependent.com

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