Managed Account Select® provides access to an expansive range of third-party asset managers and focused investment strategies for you to create a portfolio tailored to your needs. All asset managers and investment strategies undergo thorough evaluation and are regularly monitored by Charles Schwab Investment Advisory, Inc.

**Fixed Income**

**Municipal Bond Ladder**
- Parametric TABS 1–8 Yr Municipal Ladder
- Parametric TABS 1–8 Yr Municipal Ladder—CA
- Parametric TABS 1–14 Yr Municipal Ladder
- Parametric TABS 1–14 Yr Municipal Ladder—CA
- Parametric TABS 3–12 Yr Municipal Ladder
- Parametric TABS 3–12 Yr Municipal Ladder—CA
- Parametric TABS 5–15 Yr Municipal Ladder
- Parametric TABS 5–15 Yr Municipal Ladder—CA
- PIMCO 1–6 Year California Municipal Bond Ladder
- PIMCO 1–6 Year Municipal Bond Ladder
- PIMCO 1–6 Year New York Municipal Bond Ladder
- PIMCO 1–12 Year California Municipal Bond Ladder
- PIMCO 1–12 Year Municipal Bond Ladder
- PIMCO 1–12 Year New York Municipal Bond Ladder
- PIMCO 1–18 Year California Municipal Bond Ladder
- PIMCO 1–18 Year Municipal Bond Ladder
- PIMCO 1–18 Year New York Municipal Bond Ladder

**Corporate Bond Ladder**
- Chandler 0–6 Yr Corporate Bond Ladder
- Chandler 0–12 Yr Corporate Bond Ladder
- Parametric 1–5 Yr Corporate Bond Ladder
- Parametric 1–10 Yr Corporate Bond Ladder
- Parametric 3–7 Yr Corporate Bond Ladder
- Parametric 5–10 Yr Corporate Bond Ladder

**Short-Term Municipals**
- Invesco Short-Intermediate Municipal Impact SMA
- Neuberger Berman Municipal Short Core
- Nuveen Limited-Maturity Municipal Bond
- Western Asset Current Market Muni

**Intermediate-Term Municipals**
- AllianceBernstein Tax Aware Fixed Income Portfolio
- Breckinridge Interns Sustainable Tax-Efficient SMA
- Breckinridge Long-Intermediate Municipal Bond
- GW&K Municipal Bond Strategy
- JPMorgan Intermediate-Term Municipal Bond
- Nuveen Intermediate-Term Municipal Bond
- Wells Fargo CoreBuilder Municipal Income

**Long-Term Municipals**
- Nuveen Long-Term Municipal Bond

**Short-Term Bond**
- Chandler Short-Term Bond SMA
- GW&K Short-Term Taxable Bond Strategy
- PIMCO Low Duration SMA

**High Yield**
- GW&K Corporate Bond Opportunities Strategy
- Seix High Yield Bond SMA

**Intermediate-Term Bond**
- Eagle Asset Management High Quality Taxable
- Madison Intermediate Fixed Income
- PIMCO Real Return
- Sage Advisory ESG Intermediate Fixed Income

**Core Bond**
- BlackRock Core Bond-SMA
- Brown Advisory Sustainable Core Bond
- Natixis/Loomis Sayles Core Total Return
- PIMCO Total Return

**Corporate Bond**
- Cincinnati Investment Grade Corporate Bonds
- Principal Investment Grade Corporate Bond SMA

**Convertibles**
- MacKay Shields Convertibles SMA

**Preferreds**
- Spectrum Preferred Securities SMA
- Spectrum Preferred Tax Advantaged SMA
- Stonebridge Advisors Preferred SMA
- Stonebridge Advisors Preferred Tax Advantaged SMA

**Multi-Asset**

**Balanced**
- Eagle Asset Management Strategic Income Portfolio
- Eagle Asset Management Strategic Income Portfolio with Municipals
- GW&K Balanced Income Strategy with Municipals
- RNC Center Balanced Growth with Dividend Income

**Global Balanced**
- BlackRock Global Dividend Balanced SMA

**Asset Allocation**
- Nuveen Moderately Conservative Portfolio—Muni Bonds
- Nuveen Moderate Portfolio—Muni Bonds
- Nuveen Moderately Aggressive Portfolio—Muni Bonds
- Nuveen Aggressive Portfolio
- Parametric Moderately Conservative Portfolio—Taxable Bonds
- Parametric Moderately Aggressive Portfolio—Taxable Bonds
- Parametric Moderately Aggressive Portfolio—Muni Bonds
- Parametric Aggressive Portfolio
### Equity

**All Cap Core**
- GW&K Equity Dividend Plus Strategy
- Parametric CC—Russell 3000

**All Cap Value**
- Diamond Hill All-Cap Select

**All Cap Growth**
- ClearBridge Multi-Cap Growth ESG
- Riverbridge All-Cap Growth

**Large Cap Core**
- Atlanta High Quality Select Equity
- BlackRock Large-Cap Core Equity
- CIBC Equity Income (K-1)
- CIBC Equity Income (non K-1)
- ClearBridge Appreciation

**Large Cap Value**
- Columbia Select Large-Cap Value
- EIC Large-Cap Value Tax Aware
- EIC Large-Cap Value Tax Neutral
- JPMorgan Equity Income
- Zacks Dividend

**Large Cap Growth**
- Calvert/Atlanta Socially Responsible Equity
- Columbia Select Large-Cap Growth
- GSAM Large-Cap Growth
- Winslow Capital Large-Cap Growth

**Mid Cap Core**
- ClearBridge Mid-Cap
- Principal Mid-Cap Equity

**Mid Cap Value**
- JPMorgan Mid-Cap Value
- Nuance Mid-Cap Value

**Mid Cap Growth**
- GSAM Mid-Cap Growth

**Small-Mid Cap Core**
- Atlanta High Quality Small/Mid-Cap Core*
- Bahl & Gaynor Small/Mid-Cap Income Growth
- GW&K Small/Mid-Cap Equity Strategy

**Small-Mid Cap Value**
- Edge SMID-Cap Dividend Income
- Neuberger Berman SMID-Cap Intrinsic Value

**Small-Mid Cap Growth**
- Riverbridge SMID-Cap Growth

**Small Cap Core**
- Atlanta High Quality Small-Cap*
- Glenmede Small-Cap Core
- GW&K Small-Cap Core*
- John Hancock US Small-Cap Core
- Principal Small-Cap Select Core

**Small Cap Value**
- DGHM Micro-Cap Value
- Principal Small-Cap Value

**Small Cap Growth**
- Bahl & Gaynor Small-Cap Quality Growth
- Eagle Asset Management Small-Cap Growth*
- Franklin Small-Cap Growth SMA
- Granite Small-Cap Growth Equity

### Global Equity

**Large Cap Core**
- Lazard Global Equity Income ADR
- Lazard Global Equity Select ADR
- O’Shaughnessy Enhanced Dividend

**Large Cap Value**
- JPMorgan International Core ADR
- Neuberger Berman International ADR
- Parametric CC—Fundamental International ADR
- Parametric CC—MSCI EAFE ADR

**Large Cap Growth**
- Cambia International ADR
- Lazard International Equity Select ADR
- Logan International Dividend ADR SMA

**Mid Cap Core**
- CIBC International Growth ADR SMA
- Invesco International ADR Growth SMA
- Thornburg International Growth ADR Strategy—Wrap

**Mid Cap Value**
- Renaissance International Small-Cap Equity

**Mid Cap Growth**
- Invesco International ADR Growth SMA

**Mid Cap Value**
- Cambia International ADR
- Lazard International Equity Select ADR
- Logan International Dividend ADR SMA

**International Core**
- JPMorgan International Core ADR
- Neuberger Berman International ADR
- Parametric CC—Fundamental International ADR
- Parametric CC—MSCI EAFE ADR

**International Value**
- Lazard Global Equity Income ADR
- Lazard Global Equity Select ADR
- O’Shaughnessy Enhanced Dividend

**International Growth**
- Invesco International ADR Growth SMA
- Thornburg International Growth ADR Strategy—Wrap

**International Small-Cap**
- Renaissance International Small-Cap Equity

**Emerging Markets**
- Lazard Emerging Markets Equity Select ADR
- Thomas White Emerging Markets ADR SMA

**Options Income**
- Crossmark Covered Call Income
- Schafer Cullen Enhanced Equity Income

**Real Estate Investment Trusts (REITs)**
- Adelante Total Return Strategy—SMA

**Master Limited Partnerships (MLPs)**
- Salient MLP SMA

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*Closed to new accounts. Transfers only.

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