You have a world of financial goals.

Your Schwab Financial Consultant can help you reach them.

charles SCHWAB

Own your tomorrow®

Conversations about financial and investing goals anytime.
Connections to our many resources through your Schwab Financial Consultant.

Your Schwab Financial Consultant can introduce you to many ways to help meet your investing and financial goals.

Financial planning. Planning and guidance for your financial goals from your Schwab Financial Consultant, as well as comprehensive, one-time, fee-based financial planning from a CERTIFIED FINANCIAL PLANNER™ professional.[1]

Portfolio advice. An assessment of your portfolio risk and asset allocation, as well as a periodic review of your portfolio's performance to help ensure that you are on track for your financial goals.

Retirement planning. An assessment of your retirement planning goals and guidance with retirement savings and investing.

Charitable planning through Schwab Charitable™. Specialists, solutions, and online resources to help you develop and fulfill your charitable goals.

Schwab perspectives and insights. Economic and market analysis from the Schwab Center for Financial Research.

Cooperation with outside financial associates. The ability to work with your outside associates, such as with your tax advisor and estate attorney.

Tax, trust, and estate specialists. Schwab specialists who provide guidance on trust, estate, and tax planning issues.[2]

Fixed income specialists. Schwab specialists who can help you identify fixed income products—such as bonds, bond funds, CDs, and preferred stocks—and portfolio strategies that are designed to help meet your needs.

Schwab Trading Services™. Access to a wide range of trading tools and platforms as well as support from trading specialists.

Specialized service teams. One-stop support for all client service needs, including transactions, account changes, and guidance on trading execution.

Global investing. Global trading capabilities and guidance with international portfolio diversification.[3]

Options and futures trading. The ability to trade options and futures through your Schwab account.

Online tools and resources. Web and mobile access to industry research, portfolio performance reporting, screeners, calculators, and more.

Investor education. Workshops and online education on numerous investment topics.

Insurance and annuities. Annuities and life insurance products available through Schwab.[4]

Schwab Bank. Deposit and lending services provided by Schwab Bank.

[1] Financial planning with a CFP® professional can consist of a one-time, fee-based consultation with a CERTIFIED FINANCIAL PLANNER™ professional. Simply call 1-866-671-2331 to schedule the professional consultation that's right for you.

[2] Schwab does not provide tax advice. Clients should consult a professional tax advisor for their tax advice needs.

[3] International investments involve additional risks, which include differences in financial accounting standards, currency fluctuations, geopolitical risk, foreign taxes and regulations, and the potential for illiquid markets. Diversification strategies do not ensure a profit and do not protect against losses in declining markets.

[4] Charles Schwab & Co., Inc. distributes certain life insurance and variable annuity contracts that are issued by nonaffiliated insurance companies. Not all products are available in all states.

Schwab Charitable™ is the name used for the combined programs and services of Schwab Charitable Fund™, an independent nonprofit organization. Schwab Charitable Fund has entered into service agreements with certain affiliates of The Charles Schwab Corporation.

Fixed income securities are subject to increased loss of principal during periods of rising interest rates. Fixed income investments are subject to various other risks, including changes in credit quality, market valuations, liquidity, prepayments, early redemption, corporate events, tax ramifications, and other factors.

Futures trading carries a high level of risk and is not suitable for all investors. Certain requirements must be met to trade futures. Please read the document titled "Risk Disclosure Statement for Futures and Options," available at 1-800-435-4000, before considering any futures transaction.

Options carry a high level of risk and are not suitable for all investors. Certain requirements must be met to trade options through Schwab. Please read the Options Disclosure Document titled "Characteristics and Risks of Standardized Options" before considering any option transaction. Call Schwab at 1-800-435-4000 for a current copy. Supporting documentation for any claims or statistical information is available upon request.

Please note there are certain eligibility requirements if you are interested in working with a dedicated Financial Consultant.

Supporting documentation for any claims (including any claims made on behalf of options programs or the options expertise of sales persons), comparisons, recommendations, statistics, or other technical data will be supplied upon request.

Schwab's StreetSmart Edge® is available for Schwab Trading Services™ clients (formerly known as Active Trader or Active Trading Services). Call 1-800-450-0669 to request access (A Schwab brokerage account is required.) This offer may be subject to additional restrictions or fees and may be changed at any time.

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